



**Standards and Trade
Development Facility**

MOBILIZING AID FOR TRADE FOR SPS-RELATED TECHNICAL COOPERATION IN EAST AFRICA

SPS BALANCE SHEET FOR UGANDA

Research work for the Standards and Trade Development Facility

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

1. Introduction

1. The objective of this STDF research work is to further strengthen the linkage between "supply" and "demand" of technical cooperation in the area of food safety, animal and plant health (collectively known as sanitary and phytosanitary or SPS) requirements. As such, this research is being carried out in the framework of the Aid for Trade initiative. The work builds on existing capacity assessments in the SPS area – including Diagnostic Trade Integration Studies (DTIS) developed under the Integrated Framework (IF), capacity evaluation tools developed and applied by international organizations such as the Food and Agriculture Organization (FAO) and the World Bank, as well as other studies and reports. It is not a new capacity evaluation, but rather an attempt to consolidate the results of previous studies.

2. This report presents a balance sheet of needs and supply in the SPS area for Uganda. Similar balance sheets are being developed for Kenya and Tanzania, as well as at a regional level. The aim of the report is to strengthen the supply and demand for SPS-related technical cooperation by:

- acting as a focus for information sharing on needs evaluations and ongoing and planned activities; and
- identifying gaps where they exist and further mobilizing the provision of capacity building resources as necessary.

2. Overview of priority action areas

3. In line with the Poverty Eradication Action Plan (PEAP) and the National Trade Sector Development Plan (2008/9-2012/13), Uganda aims to increase the volume and diversity of its agro-food exports - which supply about 90% of its foreign exchange earnings. To meet this target, producers, processors and traders will have to comply with food safety, animal and plant health requirements imposed by trading partners in different commercial settings, notably in non-traditional export sectors. Similarly important, improving the domestic food safety situation will reduce pressure on the overburdened public health system, contribute to food security through reduction of post-harvest losses, and might positively affect Uganda's growing tourism sector (hotels, restaurants, etc.).

4. Awareness of the potential impact of non-compliance with SPS standards has been heightened following the EC fish trade restrictions by the end of the 1990s. Since then, government departments have sought to increase budgetary resources to carry out regulatory enforcement, and awareness of the importance of food safety and agricultural health issues has spread into other industries, mostly at the level of food processors.

5. In the livestock sector, SPS problems are a major constraint to growth and a barrier to trade due to the presence of endemic OIE notifiable diseases. In 2006, Uganda reported confirmed clinical cases of African Swine Fever, Brucellosis, Foot and Mouth Disease, Lumpy Skin Disease, Rabies and, in 2007, an outbreak of Peste des Petits Ruminants. Trade restrictions were imposed on Ugandan poultry by neighbouring countries as a result of concerns over a suspected case of Highly Pathogenic Avian Influenza. In addition to limiting trade possibilities, livestock diseases also reduce animal production and productivity. Animal diseases have negative impacts on income generated by the livestock sector and directly impact on poverty and food security for the poorest farmers reliant on animal husbandry.

6. In Uganda's floriculture industry concerns exist over the international transmission of plant pests and the weak phytosanitary control system. The horticulture industry faces a number of constraints on its competitiveness and its growth prospects, of which standards-related challenges are one part (depending on product composition and market orientation). With considerable financial and technical support from donors, other smaller agro-food export supply chains that have made - albeit modest - advances over the years include

vanilla and honey. Regional safety and quality standards also play a role in Uganda's fluctuating maize exports to the region.

7. Exports of traditional agricultural commodities (mainly coffee, cotton and tea) have declined or stagnated over the last two decades. One major reason for this decline in coffee production is Coffee Wilt Disease (CWD), which has had a far reaching impact on the coffee industry in Uganda affecting production levels, livelihoods, trade and overall volume and value of Ugandan coffee. CWD has exacerbated other problems, such as falling international prices, growing international competition, and other supply-side issues, and serves to underline the importance of applying SPS controls for both import and export. In the tea sector, it is anticipated that forthcoming testing requirements for heavy metals and pesticides may have a direct impact on producers.

8. Uganda faces many development challenges in relation to the competitiveness of its agricultural exports, standards management being one of the issues that requires attention. Weak capacity in SPS management pervades large segments of Uganda's food and agricultural trade, weakening its overall competitiveness and reducing returns for primary producers, processors and traders. Furthermore, there are evident risks of market access problems in the future, both among traditional and non-traditional export products (World Bank, 2006).

9. Until September 2007, a multi-sectoral SPS/TBT Committee met regularly to coordinate and discuss issues related to the implementation of the SPS and TBT Agreements at national level. Moreover, Uganda's recently adopted National Trade Sector Development Plan calls upon the Ministry of Tourism, Trade and Industry (MTTI) to develop a national SPS policy to protect human, animal and plant life and health. This includes a review of the existing SPS environment and creation of a mechanism for implementation of the policy. These initiatives are important - as the overall picture is still one of fragmentation, duplication of efforts, disputes arising from overlapping mandates, and lack of coordination among government agencies and the private sector. Of particular concern is the apparent inability to rapidly enact new/revised SPS legislation.

10. Based on the DTIS Action Plan and other capacity assessments and evaluations, the following priority areas not covered by existing or future planned donor assistance emerge in the SPS area:

- **Development of a national SPS policy in line with the National Trade Sector Development Plan.** The elements necessary to devise such a plan are present. Furthermore, in the form of the multi-sectoral SPS/TBT Committee, Uganda has the body to draw the various threads together into a coherent whole. Lacking is awareness of the importance of SPS outside of those persons involved in this immediate policy area and good argumentation as to why scarce resources should be devoted to it. It is thus important that this national policy should be underpinned with cost-benefit analysis as to why resources should be devoted in this area. Such an economic underpinning to the policy is particularly important in the context of general budget support. A targeted programme in support of development of this policy and its advocacy within government, based on a revitalization of the national SPS/TBT Committee is recommended. As part of this policy development programme:
 - better definition should be given to existing roles and responsibilities;
 - the enactment of various pieces of new/revised SPS legislation should be pursued; and
 - various policy issues, such as formally linking issuance of phytosanitary certificates with mandatory adoption of GLOBALGAP protocols and other management systems and establishment of a National Fish Authority, should be reviewed.

- **Promotion of a concerted programme of public and private investment in the livestock sector.** Research work funded by NORAD as part of the Uganda Meat Export Development (UMED) Programme underscores both the export potential of the Ugandan livestock and the constraints which are faced. From this analysis it is clear that a major programme of investment is needed to bring the livestock sector up to international standards. A detailed analysis of veterinary services has been carried out through the use of the OIE tool on the Performance of Veterinary Services. This report is not in the public domain, but the veterinary services are encouraged to use it as a basis on which to identify priority action areas for technical assistance and public investment. It is recommended that the Norad report be used as the basis for designing a public/private investment strategy in the livestock strategy.
- **National and regional campaigns to tackle animal diseases should be considered.** Rinderpest eradication programmes have borne fruit and are considered by some as a model which could be applied to other livestock diseases. In March 2007, AU-IBAR and the European Commission signed a three year, Euro 21.5 million partnership agreement for a Support Programme on Integrated National Action Plans for Avian and Human Influenza (SPINAP-AHI). In addition to HPAI, other livestock diseases, such as FMD or Peste des Petits Ruminants, could merit similar large scale interventions. In addition to consideration of multi-country, multi-annual disease control programmes, significant improvements in disease status can be achieved through targeted investments, often at a less macro-level. Consideration should be given to strengthening existing national surveillance, monitoring and control programmes as well as designing new interventions for diseases of particular concern.
- **Maintenance of compliance capacity in the fisheries sector.** The inland fisheries sector based around Lake Victoria is undergoing a consolidation. It is important that SPS compliance capacity developed since the EC bans of the late 1990s is not discarded as a result of this economic downturn. Investment and training of the public and private sector, in particular for landing sites, should be continued.
- **In floriculture and horticulture, the main challenge lies in expanding supply chains to reach larger numbers of small-scale primary producers.** An important complement to that work is to undertake awareness raising and promotion of basic/good practices through existing trade and industry associations. Overall there is a need to promote a "quality culture".
- **Take actions to improve the domestic food safety situation, both for the domestic population and tourists.** Enactment of pending legislation and the revision of secondary legislation would assist by providing a legal basis for enforcement actions. In general, promotion of good hygienic practices among street vendors, HACCP for food processing and general public awareness campaigns would assist in reducing the incidence of food-borne illness. Investment in improving food safety in the growing tourist sector, starting from a comprehensive baseline survey on food safety in hotels and restaurants, would also assist. Rationalization of laboratory capacity and more clearly defining the role of UNBS relative to that of private sector might also be considered.

3. Overview of ongoing and planned donor assistance

11. The Uganda Joint Assistance Strategy (UJAS, 2005-2009) specifies the ways in which donors support the Government's efforts to achieve the PEAP targets.¹ Donors in Uganda are organized through membership in the Local Development Partner Group (LDPG). There are also sector and thematic working

¹ In 2005, the UJAS was signed by the AfDB, Germany, the Netherlands, Norway, Sweden, DFID and the World Bank. Other development partners that have since joined the UJAS include Austria, the EC, Denmark and Ireland.

groups (private sector, agriculture development, etc.) to coordinate support to sectors and sub-sectors. Three key trends in bilateral donor support can be identified:

- (a) Move to general budget support. This trend implies that in terms of mobilizing capacity building resources in the SPS area, it is imperative that Ugandan politicians and high level decision-makers are made more aware of the importance of trade and SPS capacity building to the country's competitiveness in international markets.
- (b) Within the rubric of general budget support, specific sector budget support is another aid modality being increasingly used. Efforts could be made for trade and SPS capacity building to figure more prominently in existing basket programmes focusing on *inter alia* agriculture, private sector development, etc. Establishing a specific basket programme for trade and development issues (linked to the National Trade Sector Development Plan and the DTIS action matrix) could be considered.
- (c) Continuation of donor support for specific project initiatives, whether at national, regional, ACP or all developing country level. Many donor funding cycles finish in 2007/2008. An overview of on-going and future planned donor programmes is provided in **Annex I**.

4. Specific SPS market access constraints

Products/markets	SPS compliance constraints	Ongoing and planned assistance	Recommended actions/gaps	Priority
Fish and fishery products				
<p>Fish sourced from inland fisheries (mainly Lake Victoria as well as other lakes and rivers) and aquaculture. Sector estimated to employ about 250,000 people directly (processing sector about 5,000). Fishing activity artisanal and based on traditional small vessels, canoes and "collector boats". Concerns about sustainability of fisheries in Lake Victoria (only 40% of processing capacity being used).</p> <p>Main export is Nile perch (fresh or frozen fillets) from Lake Victoria. Small amounts of tilapia are also exported. Major markets are EU (75%), followed by the US and UAE. Import into EU authorized from 16 land-based establishments. Fish products also sold to hotels and restaurants.</p> <p>Limited opportunities to add value (food preparation, altering product component, etc.). Potential to increase exports (smoked or dried) to neighbouring markets.</p> <p>Aquaculture production is negligible but has growth potential (notably tilapia farming, both in ponds and cages) with export possibilities to neighbouring countries.</p>	<p>Fisheries production and control conditions generally "at least equivalent" to those applied in the EC (FVO report, 2006) but evident weak links in the supply chain remain - posing potential risks to sector if not properly managed.</p> <p>Processing sector regarded as "world class" - in contrast with conditions of most landing sites and inefficiencies in distribution chain (high rates of post harvest losses, etc.) (DTIS)</p> <p>Fish supply chain lacks traceability system (in near future growing number of buyers expected to request full traceability of products and raw materials)</p> <p>Constraints in aquaculture relate to low availability and high cost of inputs (tilapia fry, feeding stuffs, etc.), insufficient regulatory and investment environment and - in future - resource conflicts. Need to establish monitoring and control systems to ensure that aquaculture products meet food safety requirements of export markets</p>	<p>Following the EC bans, support was provided by several donors and international organizations including the EC, FAO/CFC, UNIDO and others.</p> <p>Specific ongoing and planned activities identified include:</p> <ul style="list-style-type: none"> - EC - Implementation of Fisheries Management Plan for Lake Victoria (LVFMP, ending in 2008 except for landing site component) - EC - Strengthening Fishery Product Health Conditions in ACP countries (SFP, extended until 2010) - AfDB Fisheries Development project (upgrading 30 landing sites). Another 9 sites are reportedly being upgraded by the EC (6, LVFMP), Japan (2) and China (1) <p>There is emerging interest in aquaculture by larger private investors (targeting both domestic and exporting markets). Several initiatives are underway to advance the rate of aquaculture development. USAID FISH project aims to jump-start the commercial fish farming industry (including export supply) by addressing developmental bottlenecks. Model cage- and pond-based fish farms are being established based on best management practices (tilapia and catfish).</p>	<p>Upgrade of landing sites (and close non-compliant facilities) and consider development of landing site pilot project to test new management model in small number of landing sites (followed by national roll-out, see DTIS)</p> <p>Continue investment in upgrading fish inspection and control system (financial and staff resources) and establish Uganda Fish Authority (UFA)</p> <p>Pesticide residues: shift from consignment testing to surveillance approach (random samples of water, raw material and products) (DTIS)</p> <p>Develop awareness-raising and training program for fishermen to promote hygiene, proper handling practices and storage to preserve fish quality (DTIS)</p> <p>Examine feasibility and approaches to implement (over time) traceability system into fish supply chain</p> <p>Further develop aquaculture framework - including training facilities, regulation, risk assessment, good aquaculture practice, etc. (see DTIS actions)</p>	<p>1</p> <p>1</p> <p>1</p> <p>1</p> <p>2</p> <p>2</p>

Products/markets	SPS compliance constraints	Ongoing and planned assistance	Recommended actions/gaps	Priority
Floriculture and horticulture products				
<p>Flower export dominated by sweetheart roses (fifteen companies, employing 5,000 people) to EU. Efforts to diversify into chrysanthemum cuttings (three companies, employing 1000 people) and tropical flowers. Most companies comply with commercial standard schemes. Slight decline in export in 2005-06 (power shortages, storm damage and poor cold chain management).</p> <p>Fruit and vegetable production dominated by smallholder farmers. Commodities include hot pepper, matooke, okra and selected other commodities. Trade directed towards EU (especially UK) wholesale markets. Cross-border trade in banana (and smaller amounts of pineapple and melon) mainly directed to Kenya. Small-holders also supply local markets (including hotels/restaurants/ supermarkets). Some imported crops (garlic/asparagus) could be produced locally.</p> <p>Limited opportunities for horticulture export (see DTIS). Successful niche markets include hot peppers. One company exports fresh herbs on limited scale. Limited opportunities in fruit processing (dried fruit and fruit juice).</p>	<p>Major constraints faced by floriculture - and especially horticulture - industry include climate, markets, cold storage and other infrastructure, shortage of skilled middle management, electricity supply and limited enabling environment.</p> <p>Comparatively few significant problems related to standards compliance in horticulture industry due to product composition and market orientation.</p> <p>Poor cold storage management is the key SPS constraint in floriculture industry. Some consignments were recently rejected due to mildew and infestation of white flies (recent expansion of Crop Protection Department should help intercepting such consignments before shipment)</p> <p>No significant problems are reported related to compliance with private standards in floriculture industry, while arrangements are in place to use selected specialized chemicals for testing purposes prior to formal registration. Industry planning to move to higher altitude production (helping further diversification).</p>	<p>Most previous attempts to target higher value horticulture exports for broader European market base have not been very successful (exception being hot peppers). USAID recently assisted in targeting US flower markets and helping Uganda Flower Exporters Association (UFEA) drafting a business plan (SCOPE project, 2004-2006). Other projects have concentrated on achieving EUREPGAP certification (e.g. PIP). However, lack of competitiveness is hampered by other constraining factors, and it remains to be seen if these projects will open up more export opportunities.</p> <p>Specific ongoing and planned activities include:</p> <ul style="list-style-type: none"> - Netherlands (WSSD) projects (2008-2010) focusing on 1) identifying, testing and developing supply chain arrangements (matooke, sweet potato, hot pepper and pineapple) 2) improving cold chain management and 3) planting materials, training and identification of indigenous species - USAID (APEP, 2003-2008) works with flower producers on new growing practices, private-sector investment, training in post-harvest controls, and pest management programs - USAID/USDA support various SPS projects under the African Global Competitiveness Initiative (AGCI) - STDF – Centre of Phytosanitary Excellence - regional FAO project addressing fruit fly infestation seeking funding 	<p>The following actions are recommended:</p> <p>Reconsider proposal to link issuance of phytosanitary certificates with mandatory adoption of EUREPGAP standards (no demand for EUREPGAP compliance from commercial partners) (DTIS)</p> <p>Develop program on phasing out of use of methyl bromide as agreed under Montreal Protocol (e.g. steam sterilization techniques)</p> <p>Consider regional arrangement on registration of chemicals (having undergone testing in Kenya/Tanzania)</p> <p>Promote quality and facilitate broad adoption of good agricultural practice, better post harvest and packing practices and associated systems supply chain management (possibly in the form of a "UgandaGap"), appropriate to the industry's level of development and in accordance with buyer's requirements (DTIS)</p> <p>Develop courses for training supervisors and middle management</p>	<p>1</p> <p>1</p> <p>2</p> <p>2</p> <p>2</p>

Products/markets	SPS compliance constraints	Ongoing and planned assistance	Recommended actions/gaps	Priority
Traditional commodities				
<p>Uganda's main traditional commodities in order of export value are coffee, cotton, tobacco and tea. Coffee is the main source of income for some 500,000 rural households. Falling prices, large production losses and Coffee Wilt Disease (CWD) caused export decline until recently, but sector has growth potential.</p> <p>Cotton is produced by small-holders and main source of income for some 250,000 rural households. Total employment in the tea sector is estimated around 40,000 people. Quality is comparable to teas from Tanzania (about 90% sold through Mombasa auction in Kenya).</p> <p>Limited opportunities for market differentiation, particularly in OECD markets, through organic and other schemes adding value to traditional commodities.</p>	<p>Main challenges in the coffee sector are devastating effects of CWD (replant and recover production volumes and develop CWD-resistant varieties) and restructuring of coffee replanting programme. Only few consignments have been rejected due to ochratoxin A.</p> <p>Main challenge in the tea sector is to consolidate and improve quality. Sector anticipates future market demands, i.e. more testing for heavy metals and pesticides</p> <p>Main constraint in the cotton sector is low productivity and improper handling and storage practices.</p>	<p>Various donors have provided general agricultural support or support related to upgrading the quality of traditional commodities, notably coffee - including the EC, the US (including GM cotton), Denmark and other donors. Much attention has been devoted to promoting "specialty" dimensions (for instance SIDA's Export Promotion of Organic Products from Africa, EPOPA) rather than core productivity, quality and disease issues facing the bulk of growers.</p> <p>FAO, International Coffee Organization (ICO), European coffee industry and Uganda Coffee Development Authority (UCDA) have provided assistance on better coffee drying, storing and fungus monitoring – but more assistance is needed.</p> <p>Specific ongoing and planned activities supporting agricultural export crops and/or specific sub-sectors are included in Annex I.</p>	<p>The DTIS Action matrix contains the following recommendations:</p> <ul style="list-style-type: none"> - Enhance donor support to combat CWD - including study of disease outbreaks, development and testing of CWD resistant varieties and restructuring of coffee replanting programme - Raise awareness among increasing number of coffee producers on importance of quality and ochratoxin control (development of industry-wide training programme) - Consider initiation of work on legal and regulatory framework for GMOs; - Start work on assessments and testing for heavy metals and pesticides in tea to prepare for new market demands 	<p>1</p> <p>1</p> <p>1</p> <p>2</p>
Maize				
<p>Maize has recently become major non-traditional export crop supplying regional market (relief supplies, cross-border and Southern Africa region). Maize value chain supports about 2 million households (95% smallholders), 1000 traders and 600 mill operators (maize flour being an important value chain). Potential export capacity estimated between 100,000 and</p>	<p>Various constraints exist at production, marketing and milling level. Poor post-harvest handling and storage facilities result in high post-harvest losses, poor quality and risk of mycotoxin contamination (leading, in turn, to rejections of shipments). Reportedly maize standards have been adopted at EAC level and are applied by World Food Programme (WFP)</p>	<p>Support to the maize sector at national level has primarily come from APEP (2003-2008) - including provision of training to farmers to improve post harvest practices - and at regional level from the Maize Programme under RATES (2003-2008, USAID) including:</p> <ul style="list-style-type: none"> - harmonization of COMESA maize standards by end 2008; - strengthening capacity in Eastern Africa Grain Council (EAGC); 	<p>Recommended actions (DTIS) to further reduce post harvest losses and improve maize safety and quality include:</p> <ul style="list-style-type: none"> - Evaluation and application of quick screening tests for aflatoxin to be used at collection centres and storage warehouses - Intensification of efforts to improve post harvest drying/management of 	<p>1</p> <p>2</p>

Products/markets	SPS compliance constraints	Ongoing and planned assistance	Recommended actions/gaps	Priority
150,000 MT per year. Export performance has been half this amount, reflecting low level of penetration. Demand will remain high due to drought conditions and large purchases from neighbouring countries.	for regional purchases	- support to structured regional trading system and strengthening information network systems - further linking food aid with commercial trade	maize through additional training and investment in suitable facilities	
Livestock and poultry products				
<p>Greatest concentration of livestock found in "cattle corridor", extending from South-Western to North Eastern Uganda. Livestock predominantly used for supporting rural households (80% owned by smallholders, i.e. herds of 20-100). About 165 large ranches account for 2% of cattle (largest up to 3,000). About 100 ranches organized in Uganda Beef Producers Association (UBPA). Census being undertaken.</p> <p>Nearly half of animals slaughtered at family level. Low hygienic standards prevail in slaughtering facilities and inspection is limited. Some cross-border trade (through permits) and illegal movements by pastoralists reported.</p> <p>Poultry industry estimated to support 200,000 people directly. Uganda also has populations of goats, sheep and pigs.</p> <p>Small and largely informal dairy</p>	<p>National policies and strategies put emphasis on export of livestock products. Efforts hampered by lack of (business) infrastructure, capability to support trade (both regionally and internationally) and disease profile.</p> <p>Single most important is weak capacity to control range of OIE notifiable animal diseases.²</p> <p>Other constraints relate to <i>inter alia</i> poor animal husbandry practices, outdated legislation, fragmented inspection, lack of budgetary resources, inadequate identification systems, poor slaughtering and handling practices and facilities, understaffed and dysfunctional laboratories, etc.</p> <p>Poultry sector suffers from export ban to Kenya. Other constraints relate to low quality of feed</p>	<p>Benefits from many national and regional livestock development programs (EU, USAID, FAO, UNIDO, GTZ, DANIDA, France, AfDB and others) tend to be watered down by their fragmented nature. Approaches to disease control continue to be outbreak driven and replication of the successful Rinderpest surveillance system (PACE) seems difficult.</p> <p>NORAD completed feasibility study on development of export-oriented meat industry (Uganda Meat Export Development Programme, UMED) (2007) aiming at exporting to EU and other markets by 2010-2011. UMED includes four projects including 1) establishment of disease free zones (DCZs); 2) organizing livestock production in DCZs; 3) developing animal health and meat hygiene services, and 4) establishing Uganda Meat Exporters Corporation (UMEC)</p> <p>USAID recently supported project with the Uganda National Dairy Traders Association (UNDTA) to promote</p>	<p>Although livestock, dairy and poultry products have not been identified in DTIS as priority areas, there is potential to expand regional and international trade. Following actions are recommended:</p> <ul style="list-style-type: none"> - Attract donor funds and investors for UMED Programme (total budget US\$20m + additional investments to improve infrastructure) - Address export ban in poultry sector through SPS diplomacy - Further increase budgetary and technical support to enhance veterinary services and animal health control, surveillance and inspection - Start nation-wide campaign on good animal husbandry practices and upgrade hygienic conditions in existing slaughterhouses and handling and processing facilities - Improve basic hygiene practices and quality management in dairy sector (and consider delegation of inspection and enforcement) - Design road map for H&S sector to increase volume and quality of H&S 	<p>1</p> <p>1</p> <p>2</p> <p>2</p> <p>2</p> <p>2</p>

² Most important in terms of international trade are Foot and Mouth Disease (FMD), Contagious Bovine Pleuropneumonia (CBPP), African Swine Fever (ASF), Lumpy Skin Disease and Peste des Petits Ruminants. Uganda is officially free from Rinderpest. Budgets for disease control were recently increased and a Livestock Disease Control Fund is in place.

Products/markets	SPS compliance constraints	Ongoing and planned assistance	Recommended actions/gaps	Priority
<p>sector important for poverty reduction with only modest potential to participate in regional trade.</p> <p>Wildlife sector relatively small and limited to trade in birds, amphibians and reptiles. Limited opportunities to diversify into other commodities (e.g. ornamental fish, tortoises, birds) and intensify commercial farming of crocodiles (hides and skins, H&S).</p>	<p>Biggest constraints in the dairy sector are low domestic consumption, limited awareness of basic hygiene practices and quality management, and limited capacity to enforce standards (notably in the informal sector).</p> <p>Main constraints in the H&S sector are low volume and quality of H&S due to <i>inter alia</i> diseases, lack of good animal husbandry and slaughtering practices.</p>	<p>awareness of basic hygiene and quality management in pilot areas.</p> <p>At regional level, the RATES dairy programme (USAID) works to promote intra-regional exports of dairy products through Eastern and Southern African Dairy Association (ESADA). COMESA Dairy SPS protocol is scheduled to be adopted by the COMESA Council of Ministers meeting in April 2008 (followed by adoption of at least five dairy producing countries by September 2008)</p>	<p>with focus on basic issues such as good animal husbandry, disease management and incentives to reward quality and uphold standards (DTIS)</p> <p>- Agree on a set of workable measures balancing considerations of animal disease control and trade facilitation at regional level</p>	2
Vanilla				
<p>Following vanilla boom in 2001-2004, prices dropped in 2005 due to recovery of Madagascar's production levels and substitution by synthetic vanilla. Vanilla export earnings currently stand at US\$6m (against US\$25m in 2003). Sector is estimated to employ over 10,000 farmers. Main markets are US, Canada and EU. Exporters organized in Association of Vanilla Exporters of Uganda (VANEX).</p>	<p>Sector going through rationalization phase. Main challenge is to increase supply of high and consistent quality product by small holder farmers.</p>	<p>Support to the industry mainly provided by USAID, currently through APEP project working with Ugandan vanilla growers and processors to improve production, post harvest, and marketing practices. Training provided through VANEX.</p>	<p>Continued support and training to improve production, post harvest, and marketing practices.</p>	2
Honey				
<p>Honey sector is small but important source of rural income and employment (active small-scale producers estimated at 3,300). Beekeeper associations and processing companies organized in Ugandan National Apiculture Development Organization (TUNADO).</p>	<p>- Main challenge is to increase supply of high and consistent quality product by small holder industry. Current capacity to address production and post harvest deficiencies is low and needs to be enhanced. There is need to increase inspection activities, computerized surveillance systems and</p>	<p>Since the late 1990s donor assistance has focused on honey industry (UNIDO, SIDA (organic honey), Shell Foundation and others). Existing initiatives include support from DANIDA under the Agricultural Sector Support Programme II (ASSP II, 2004-2009), i.e. financing an in-house lab for honey testing.</p>	<p>- Develop apiculture enhancement programme including promotion of modern beekeeping practices and improved post-harvest practices, formation of beekeeping groups, research to inform growers and processors, development of strategy to access more remunerative markets, etc.</p> <p>- Develop capacity and systems of</p>	2 3

Products/markets	SPS compliance constraints	Ongoing and planned assistance	Recommended actions/gaps	Priority
Opportunities exist to diversify revenue base by exporting to EU (Uganda listed as such and has annual Residue Monitoring Plan (RMP) in place). However, due to higher price Ugandan honey is reportedly sold on domestic market while some - largely informal - cross-border trade take place to Kenya, DRC and Rwanda.	systems for sanitary certificates, bee movement permits, quarantines, etc. - One future potential barrier to EU export (besides price considerations) could be current standard for HMF (hydroxyl-methyl-furfural) at 40mg/kg (Codex standard being 80mg/kg, honey sold in hot climates normally reaching over 100mg/kg).		competent authority to implement RMP	
Tourism				
Uganda expects to increase its number of visitors from 450,000 to 1,000,000 by 2012. Backward linkages exist with agricultural production, i.e. fruit, vegetables, fish, meat etc. Food and beverages in most hotels and restaurants are bought at local markets New tourism legislation has been proposed (but not yet adopted) and Uganda Tourism Board was recently established. Proposals developed by MTTI to seek assistance in various areas, including food safety and quality.	No official oversight of tourist or restaurant establishments in relation to food hygiene and safety. No surveillance of tourists to determine the incidence of food- or water-borne diseases. No analysis of food sourcing policies and experiences of hotels and restaurants. Need to strengthen capacity of stakeholders to enhance level of food hygiene and safety in hospitality industry	Tourism industry has been supported through various projects including Protected Areas Management and Sustainable Use, PAMSU – World Bank) and the EC (Uganda Sustainable Tourism Development Programme, UGSDTP, 2003-2007).	- Conduct a comprehensive baseline survey and needs assessment on food safety in hotels and restaurants (DTIS) - Promote basic food safety and hygienic practices in hotels and restaurants through training, sensitization and dissemination of good practice manuals -Enhance capacity at district level to monitor and inspect operators through training and development of monitoring and evaluation tools	1 3 3

5. Food safety

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
Awareness				
<p>- Food Safety Strategic Plan (2005-2008) indicates positive attitude and willingness to improve food safety control system at all levels. National Food Safety Action Plan (FAO) drafted but not widely known. National Fisheries Policy established (2004)</p> <p>- Limited awareness of impact of foodborne diseases on national economy and development (with exception of fisheries sector)</p> <p>- Awareness of importance of food safety and quality spread into certain industries (processing and export level) but generally weaker lower in the chain (fishers, farmers, etc.)</p> <p>- Consumer Education Trust (CONSENT) - active in raising awareness on food safety matters. Awareness raising also through thematic programs and government/donor extension programs</p>	<p>Accelerate implementation of Food Safety Strategic and Action Plan, which outlines following awareness-related needs:</p> <ul style="list-style-type: none"> - increase awareness of food safety and quality at higher decision making levels - insert food safety into national development plans - prepare and disseminate information on basic food safety and quality issues to the public - provide progressive education and training on GAP, GHP and GMP - further promote/strengthen CONSENT and other consumer organizations 	<p>Previous assistance offered by FAO, DANIDA, UNIDO (laboratory infrastructure) and others.</p>	<p>- Conduct policy analysis, hold national symposium, and revise development plans for food safety/quality relevant action</p>	1
		<p>Existing and future programmes focus increasingly on private sector and business development – but relatively less on public sector capacity building.</p>	<p>- Develop sustained public campaign to educate consumers on food safety and hygiene through various media</p>	2
		<p>Relevant existing and future programmes include:</p> <ul style="list-style-type: none"> - UNIDO – regional EAC project focusing on trade capacity building in agro-industry products (2006-2010) - AfDB – Uganda Fisheries Development project - AfDB/COMESA – Agricultural Marketing Promotion and Regional Integration Project (AMPRIP, including establishment of reference labs for food safety) 	<p>- Promote awareness and application of HACCP through broad based programs in the food and manufacturing sector generally and in selected pilot products (DTIS)</p> <p>- Implement special program of food hygiene /safety awareness and appropriate technologies for small food processors, preparers and street vendors (DTIS)</p>	2
Institutional and regulatory framework				
<p>Food control system is fragmented, involves multiple institutions, is under-resourced, and lacks coordination. Most food control functions at central government level assigned to Ministry of Health (MoH) and Ministry of Agriculture, Animal Industry and Fisheries (MAAIF); Uganda National Bureau of Standards (UNBS) and commodity boards also play role</p>	<p>Outdated legislation is primary source of concern. Need to revise food and sectoral legislation to:</p> <ul style="list-style-type: none"> - recognize intrinsic "right to food"; - assign clear responsibility for food safety and quality to producers and processors; - incorporate international market requirements, scientific risk analysis etc.; - create effective coordinating 	<p>- UNIDO – regional EAC project focusing on trade capacity building in agro-industry products (2006-2010)</p> <p>- AfDB – Uganda Fisheries Development project</p> <p>- AfDB/COMESA – Agricultural Marketing Promotion and Regional Integration Project (AMPRIP, including establishment of reference labs for food safety)</p> <p>- Various FAO projects</p> <p>- USAID – Agricultural Productivity Enhancement Project (APEP) and FISH project</p> <p>- DANIDA – Agricultural Sector Programme Support II (ASPS II) (until 2009)</p> <p>- EC – Strengthening Food Safety Systems through sanitary and</p>	<p>- Seek international support (Consumer Education Trust) and consider creation of public consumer protection agency</p>	3
			<p>- Completion of consultations and actions to enact pending new food safety act (DTIS) (i.e. accelerate UNIDO work in progress) - including incorporation of effective coordination mechanism - as well as implementing regulations (additives, MRLs, etc.) Consultations must include agreement among key ministries and government organizations on how animal (and plant) health will be</p>	1

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
<p>(dairy, coffee, cotton etc.); Field activities entirely delegated to local District and Municipal Councils. Uganda's basic and sectoral food legislation is outdated and not in alignment with international requirements.³ Large queue of draft bills and policies positioned at various points in legislative process. Fisheries legislation reasonably up-to-date (provisions generally considered "at least equivalent" according to 2006 FVO report - but further revision required). Fisheries legislation currently being revised</p>	<p>mechanism to minimize institutional conflict and duplications</p> <p>There is a general need to strengthen food control system in terms of skilled manpower, facilities, and infrastructure through allocation of government budget, income generating business development activities, and incentive schemes.</p>	<p>phytosanitary (SPS) measures (ACP, 2008-2012)</p> <ul style="list-style-type: none"> - EC – Strengthening Fishery Products Health Conditions in ACP countries (SFP, extended until 2010) - USAID – SPS support under the African Global Competitiveness Initiative (AGCI) - Norad Meat Export Feasibility Study (2007) (seeking funding) - EC – 10th EDF (2008-2013, still to be determined) - EC – Lake Victoria Fisheries Management Plan (LVFMP) - Netherlands – WSSD projects 	<p>integrated in the new structure</p> <ul style="list-style-type: none"> - In line with new food safety act, revise and update related sectoral legislation/implementing regulations on <i>inter alia</i> biosafety (GMOs), meat products, fisheries (see FVO report), safety and quality of aquaculture products, etc. - Raise budgetary and technical support to implement and enforce legislation and regulations (including support to district and municipal councils) - Develop mechanism for Fisheries Department to share experience and provide support in food safety and quality control 	<p>1</p> <p>1</p> <p>2</p>
Enforcement				
<ul style="list-style-type: none"> - Central government does not adequately address training and equipment needs of field food inspectors at district level. Inspectors lack training, transportation, and sampling and inspection tools and there are no funds for regular food borne hazard monitoring. - Capabilities of private sector laboratories (and UNBS) in some instances approximating international standards. More limited capabilities in public sector laboratories.⁴ Laboratories often operate at about 50% of capacity and rationalization seems opportune 	<ul style="list-style-type: none"> - Training of inspectors and extension personnel in GAP, GMP and GMP, HACCP - Enhance collaboration between research and food control institutions (monitoring food borne hazards, mycotoxins and contaminants), academia and institutions (training of inspectors), and academia and industry (extension services) - Strengthening laboratories and installation of microbiology and chemistry labs in strategic locations - Establishment of regular pesticide monitoring of fresh fruit and vegetables and fish (heavy metals) in local markets, 		<ul style="list-style-type: none"> - Develop phased mandatory comprehensive food inspector training programme and practical curriculum for food science professionals to be offered by public universities/colleges - Prepare comprehensive inventory of all laboratories and make plan for strengthening appropriate ones (taking into account private laboratories) in terms of analytical capacity for monitoring pesticide and veterinary drug residues, contaminants, heavy metals and mycotoxins (DTIS) - Create and manage database of monitoring results and provide training and use data for risk assessment 	<p>1</p> <p>2</p> <p>2</p>

³ Including *inter alia* Food and Drugs Act (1964) (Drugs Act reviewed separately in 1993), Animal Disease Act (1964), Public Health Act (2000), National Bureau of Standards Act (1983), Food Quality Assurance Rules (1998); Fisheries Act (established in 1964 revised in 2000); Fish Quality Assurance Rules (1998); Various sector regulations (dairy, coffee etc.)

⁴ Private: Chemiphar (accredited, microbiology and chemistry including pesticide residues) and SGS (microbiological analysis of fish and fishery products); Public: Government Chemists, UNBS, MAAIF laboratories (Crop Protection, Animal Health, Fisheries) and various labs in universities and research institutes (NARO, LIRI, etc.)

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
	veterinary drug residues in dairy and meat products, mycotoxins (local and imported cereals and grains)		- Develop relevant national research agenda on food safety and quality	3

6. Animal Health

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
Awareness				
<p>- Growing awareness of current animal disease status restricting access to international markets (and negatively affecting backward linkages with tourism sector); Several policies and strategies in place outlining key strategic areas for intervention.⁵</p> <p>- Despite recent increase in budget allocation, resources still below critical minimum.</p> <p>- Limited awareness of good animal husbandry and animal health issues at lower level (herders, slaughterhouses, etc., also negatively affecting export of hides and skins)</p>	<p>- Review and analyze critically the impact of the various policies and strategies</p> <p>- Further mobilize and allocate resources to address staffing and equipment shortages (funding gap estimated at 90% of the budget, see <i>World Bank</i>)</p> <p>- Establish and promote national awareness and educational programmes, in particular at lower levels (herders, slaughterhouses)</p>	<p>At national level, FAO has completed and is currently implementing several (emergency) projects in the animal health area, including recently avian influenza. DANIDA has provided support to the development of the National Meat Improvement Strategy Plan under the Agricultural Support Programme II (ASPS II). Norad has supported the meat export feasibility study (2007), which resulted in a project currently seeking funding</p> <p>Other relevant programmes at regional level include:</p>	<p>- Establish national awareness and educational programmes</p> <p>- Request support for the review, implementation, coordination and oversight of the various policies and strategies (including critical analysis and evaluation of key strategic intervention areas) and for the development of cohesive implementation plan</p>	<p>1</p> <p>1</p>
Institutional and regulatory framework				
<p>Directorate of Animal Resources (MAAIF), headed by Chief Veterinary Officer, is responsible for animal health issues, and divided in three Departments, i.e. Livestock and Entomology (including apiculture), Animal Production and Marketing, and Fisheries. At district level, veterinary personnel is responsible for animal health/meat inspection activities (except FMD, Rabies, RP & CBPP) and headed by District Veterinary Officers (DVOs).⁶</p> <p>The Animal Disease Act (1964),</p>	<p>- Development and adoption of new animal health legislation – including implementing regulations – in line with international (OIE and Codex) standards</p> <p>- Possibly draft/update legislation on veterinary drugs, animal feed, and aquaculture/aquatic animal health (no information available)</p> <p>- Development and adoption of new legislation on meat inspection in line with OIE and Codex standards is also required</p> <p>- but must be seen in connection with adoption of new basic food law (see above)</p>	<p>EC/AU-IBAR – Support Programme to Integrated National Action Plans for Avian and Human Influenza (SPINAP-AHI)</p> <p>- AfDB/COMESA – Agricultural Marketing Promotion and Regional Integration Project (AMPRIP, including establishment of reference labs for animal health)</p>	<p>The OIE Performance Vision Strategy (PVS) tool was applied in August 2007 but is not in the public domain. Follow-up should generally be given to actions recommended therein with respect to veterinary services</p> <p>- Develop and adopt various pieces of legislation and implementing regulations (including agreement among key ministries and government organizations on how animal (and plant) health will be</p>	<p>1</p>

⁵ Including *inter alia* Meat Hygiene and Meat Quality Improvement Strategy (2006); Livestock Development Strategy (2003-2010), National Meat Policy (2001), National Strategy for Prevention, Control and Eradication of Animal Diseases (2004), National Policy on Delivery of Veterinary Service (2004), Animal Health Strategy (2005/6-2007/8)

⁶ Local Government Act authorizes local authorities to offer services for the control of all but four animal diseases, i.e. Foot and Mouth Disease (FMD), Rabies, Rinderpest (RP) and Contagious Bovine Pleuropneumonia (CBPP). Other diseases are controlled by local governments unless they are epidemic in nature.

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
<p>regulating animal health issues, is outdated. A revised Animal Diseases Act awaits parliamentary approval - as well as a new Veterinary and Para-Veterinary Practitioners Act. Wildlife Act is of more recent date (2000). No information available on veterinary drugs legislation, animal feed or aquatic animal health (Fisheries Department)</p>			<p>integrated in the new legislative structure (i.e. overarching general food law)</p>	
Enforcement				
<ul style="list-style-type: none"> - About 1200 inspectors, veterinarians and assistants work mainly in Government business. - Weakened (decentralized) chain of command has resulted in inadequate disease reporting, inadequate exchange of disease/animal health information among districts, and lack of harmonized disease-control programmes - No disease control zones (DCZs) established (but four areas recently proposed) - Import of live animals and products reportedly low - but informal (illegal) cross-border trade occurs - Surveillance programs routinely run for FMD, RP (including wildlife), BSE and CBPP (funded by donors) but difficulties reported in sustaining and replicating achievements of most projects - National Veterinary Laboratory and district laboratories not operating effectively and in need of equipment and staff. No cooperation between MAAIF and private/university/institution laboratories 	<ul style="list-style-type: none"> - Strengthen capacity of veterinary services (training, manpower, equipment, etc.) - Establish vaccination centres and involve private sector in vaccination and drug distribution/monitoring - Strengthen livestock surveillance, monitoring and reporting systems and establish reliable and sustainable eradication and surveillance programmes (consider recentralization) - Establish DCZs (developing into disease free zones) - Strengthen the central and district laboratories (as part of overall laboratory plan) and improve capacity to perform risk assessment 		<p>Recommendations arising from the OIE PVS tool should be followed</p> <p>In order to improve domestic health situation and access regional and international markets, considerable investment will be needed. Key is to ascertain donor interest and attract sufficient private sector investment. The Uganda Meat Export Development (UMED) Programme will address critical constraints in terms of legislation, disease free zones, reorganizing animal health and meat hygiene organization, etc.</p>	<p>1</p>

7. Plant health

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
Awareness				
<ul style="list-style-type: none"> - More attention given to plant health issues (e.g. potentially damaging impacts of exotic pests) through recent public awareness campaigns - Training provided for farmers including on plant health issues, basic/good agricultural practices, and safe use of pesticides. Challenge is to reach larger number of farmers 	<ul style="list-style-type: none"> - Intensify efforts to build awareness of plant health matters, basic/good agricultural practices, and safe use of pesticides through regular awareness programs and training courses at levels (politicians, senior agricultural and trade officials, farmers, private sector, etc.) - Increase stakeholder consultation and participation (including private sector) 	<p>Various programmes are ongoing or planned:</p> <ul style="list-style-type: none"> - Netherlands – three WSSD projects (approved February 2008) - Various FAO projects - FAO – regional fruit fly project (seeking funding) - STDF –Centre of Phytosanitary Excellence (COPE) for East Africa - AfDB/COMESA – KEPHIS agreed as reference lab for plant health - USAIS – SPS support under AGCI mostly looking at plant health issues (see Annex I) 	<ul style="list-style-type: none"> - Further develop and implement awareness and training programmes - Collaborate more closely with National Environmental Agency - Participate more in international meetings 	<p>1</p> <p>2</p> <p>2</p>
Institutional and regulatory framework				
<ul style="list-style-type: none"> - Within Directorate of Crop Resources (MAAIF) Crop Protection Department is responsible for management and control of plant pests, agrochemicals and seeds and issuance of phytosanitary certificates. Crop protection officers are located at MAAIF, at zonal stations and - increasingly - at border posts but number still inadequate to perform tasks and enforce SPS requirements - The Crop Protection Act (1964) is deficient in many aspects and not in alignment with international (IPPC) requirements. New Plant Protection Act drafted (with assistance from IFAD consultants) but not yet approved by Parliament New seed legislation recently approved (incorporating EAC regulations) as well as new agro-chemical legislation (separating chemicals and fertilizers). - Strong focus given within MAAIF on compliance with EUREPGAP 	<ul style="list-style-type: none"> - Phytosanitary Capacity Evaluation (PCE) tool (applied in 2003) recommended development and adoption of new Plant Protection Act in line with international requirements, designation of Crop Protection Department as NPPO and provision for PRA and pest surveillance. Need to finalize this legislative process expeditiously - Review proposal to link issuance of phytosanitary certificates with mandatory adoption of EUREPGAP standards 		<p>Finalize and enact new plant protection legislation - including implementing regulations as necessary (DTIS)</p> <p>Provide adequate and timely budget allocation to implement new legislation (staffing, participation in regional and international activities, partnership with private sector, etc.)</p> <p>Review proposal to link issuance of phytosanitary certificates with mandatory adoption of EUREPGAP standards (DTIS)</p>	<p>1</p> <p>1</p> <p>1</p>

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
standards (NB private and not a public standard scheme!) although there seems to be little or no demand for EUREPGAP compliance from commercial partners				
Enforcement				
<ul style="list-style-type: none"> - About 40 inspectors from central government and 160 district inspectors involved in inspection, surveillance and monitoring activities (at about 28 border posts) - Lack of skilled inspectors, training, operational and inspection manuals, etc. (PCE tool) - Exotic pest responses normally dictated by outbreaks and crisis management (reactive) and often dependent on donor support - Lack of an official pest list (reportedly updated in 1991 and 2004), lack of research (including PRA) and diagnostic facilities hamper the development of an effective crop protection program.⁷ There is also no institutionalized pest surveillance programme - No pest free areas (PFAs) established - No database for information storage and retrieval 	<ul style="list-style-type: none"> - Improve inspection, monitoring and surveillance system and strengthen technical competence in terms of trained manpower, equipment, transport and communication - Establish incentives, motivation and cost recovery schemes to minimize mobility of competent trained personnel - Enhance diagnostic capacity and ability to conduct PRA - Establish pest lists and PFA for export to large segment of market outlets - Establish computerized information systems, databases etc. 		<p>To some extent some of the following recommended actions by the PCE tool are being addressed by USAID:</p> <ul style="list-style-type: none"> - Procure and install inspection equipment, training in contemporary inspection procedures, and develop inspection manuals 1 - Initiate cost recovery scheme, develop database and provide training on PRA 2 - Provide diagnostic facilities and specialized training, develop diagnostic guidelines and increase international collaboration 2 - Constitute surveillance team, establish pest free areas, develop phytosanitary security system, and develop database for information storage and retrieval 2 	

⁷ Most important pests associated with staple crops such as banana are nematodes, weevils and black sigatoga, with fusarium causing panama wilt playing a secondary but important role as crop limiting factor. Fruit fly remains one of the most important pest in the region. For grains, grain borer is highly relevant.

8. Institutional SPS capacity

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
<p>Institutional clarity</p> <ul style="list-style-type: none"> - The SPS framework is characterized by unclear responsibilities, fragmentation, duplication of efforts and institutional conflicts ("turf battles") - National Trade Sector Development Plan (2008/9-2012/13) proposes development of national SPS policy - Until recently, a TBT/SPS Committee involving all major public and private sector stakeholders (including universities, NGOs) met regularly to provide coordination and guidance and act as discussion forum at national level 	<ul style="list-style-type: none"> - Strategic review towards rationalization and better definition of institutions and functions needs to be conducted (including integration of animal and plant health) - as part of broader vision for the promotion and management of standards in the context of trade and broader economic development (i.e. SPS policy) - Revitalize TBT/SPS Committee - More integration of SPS issues in planning and expenditure frameworks 	<p>UNIDO sponsored the TBT/SPS Committee meetings held until recently</p>	<ul style="list-style-type: none"> - Implement national SPS policy as per recommendations of National Trade Sector Development Plan - Allocate funding for and continue regular meetings of TBT/SPS Committee 	<p>1</p> <p>1</p>
<p>Private sector</p> <ul style="list-style-type: none"> - Limited awareness of basic/good practices and pest and disease control measures at level of individual farmers/fishers/ traders - Limited dialogue and collaboration between government and private sector on resolving SPS management capacity issues - Overall testing capacity and laboratory capability of private institutions well-established - Various trade and industry associations providing training and services to some extent⁸ 	<ul style="list-style-type: none"> - More support for private sector/farmer basic awareness and training programmes in food safety, animal and plant health at lower levels individual - Additional support to strengthen capacity of trade and industry associations - Improve financial and regulatory investment framework 	<p>Donors generally shifting to private sector and business development within their programmes</p>	<ul style="list-style-type: none"> - Shift resources to give greater attention to awareness-raising and promotion of basic/good practices at farm/fisher level - Intensify dialogue and levels of collaboration with private sector (as part of SPS policy) - Assistance to trade associations to advocate the importance of SPS compliance and provide training to their members 	<p>1</p> <p>1</p> <p>1</p>

⁸ Including *inter alia* Uganda Fish Producers and Exporters Association 2) Uganda Flowers Exporters Association 3) Uganda Apiary Development Organization 4) Association of Vanilla Exporters of Uganda 5) Uganda Manufacturers Association 6) Uganda Beef Exporters Association

Status	Needs	Ongoing and planned assistance	Recommended actions/gaps	Priority
<ul style="list-style-type: none"> - Inadequate financial and regulatory framework for private investment in food processing facilities 				
<p>Research capacity</p> <ul style="list-style-type: none"> - Some progress has been made in upgrading laboratory capacity with accreditation of Fisheries and UNBS laboratories but overall diagnostic capacity is weak - Private laboratories performing well in the provision of analytical services - Several research and universities laboratories but little orientation towards research and analytical services related to food safety, animal and plant health 	<ul style="list-style-type: none"> - Development of laboratory plan that rationalizes existing capacities and creates one central laboratory for specialized animal and plant health (followed by gradual upgrading and accreditation of selected laboratories) - Establish and promote integration, collaborative research and analytical services - including proficiency schemes and inter-laboratory comparison 	<p>Several donors have provided assistance including DANIDA and UNIDO (upcoming regional project included laboratory aspects)</p>	<ul style="list-style-type: none"> - Develop laboratory plan (DTIS) - More clearly define role of UNBS relative to that of private sector testing (recognize that UNBS' primary roles are to provide accreditation, set standards and confirm testing accuracy) (DTIS) - Develop and implement university courses on risk assessment and management 	<p>1</p> <p>1</p> <p>2</p>
<p>International participation</p> <ul style="list-style-type: none"> - SPS National Enquiry Point and Codex, OIE, IPPC Focal Points in place - National Trade Sector Development Plan calls for 1) strengthening the notification process under the SPS Agreement and 2) the sharing of information on notifications with the private sector 	<p>Additional support to enhance capacity to attend and play more active role in meetings of SPS Committee, Codex, OIE and IPPC</p>	<ul style="list-style-type: none"> - WTO regular training programme - Codex, OIE and IPPC Trust Funds - EC (PAN-SPSO project) - regional UNIDO project aims at establishing regional cooperation mechanism 	<ul style="list-style-type: none"> - Revitalize TBT/SPS Committee - Strengthen notification process 	<p>1</p> <p>1</p>

ANNEX I

Ongoing and planned SPS-related technical assistance in Uganda (2008 and beyond)

Donor	Project title	Short description	Budget (US\$)	Duration
National				
EC	10 th European Development Fund (EDF)	Uganda's next Country Strategy Paper and National Indicative Programme (2008 – 2013) is not yet available. A study to assess compliance of Uganda's food safety control system to EU market requirements was completed in December 2006 (Carl Bro Consortium) but follow-up is unknown.	Allocation to SPS issues not known	2008-2013
Netherlands	WSSD Partnership on Market Access	Three projects approved for funding in February 2008: 1) Identifying, testing, and developing appropriate supply chains arrangements for matooke, sweet potato, hot pepper and pineapple 2) Improving cold chain management 3) Appropriate planting materials, training and identification of indigenous species	1,200,000	2008-2010
AfDB	Uganda Fisheries Development project	This project features a component to upgrade and equip 30 landing sites on Lake Victoria, Kyoga, Albert, George and Edward with modern fish handling facilities. It includes construction of cold storage rooms, sorting and loading sheds and piers, as well as the installation of portable water supply, electricity, waste disposal systems, access roads and security fencing. Six more landing sites are upgraded by EC (LVFMP project, see below), two by Japan, and one by China.	38,000,000	2005-2010
Norad	Uganda Meat Export Development (UMED) programme	Feasibility study on the development of an export-oriented meat industry in Uganda (August 2007) concluded. Four parallel and independently controlled development projects proposed under the coordination of a Programme Committee. <ul style="list-style-type: none"> • establishing Disease Control Zones (DCZs) • organizing livestock production in DCZs • developing animal health and meat hygiene services • establishing and developing the Uganda Meat Export Corporation (UMEC). 	20,000,000 (seeking funding)	2008-2011
FAO	TCP/RAF/3102	Support to aquaculture sub-sector in the riparian countries around Lake Victoria. Total funding US\$359,999.	Allocation to countries and SPS issues not known	2006-2008
FAO	TCP/UGA/3101	Promotion of sustainable production and micro-processing of edible oilseeds Total funding US\$252,000	Allocation to SPS issues not known	2006-2008
FAO	TCP/UGA/3102	Improving integrated production and pest management to control banana bacterial wilt	419,000	2006-2008
FAO	TCP/RAF/3113	Emergency assistance to control Peste de Petits Ruminants in the Turkana/Karamoja region. Total funding US\$393,000	Allocation to countries and SPS issues not known	2007-2009
FAO	TCP/UGA/3103	Capacity building of regulatory agencies for handling GM seeds, crops and processed foods	306,000	2007-2009

Donor	Project title	Short description	Budget (US\$)	Duration
FAO	Other trust funds	Various activities to control and prevent avian influenza and rift valley fever at national and regional level – including development of national preparedness and response plan	Allocations not known	2006-2009
USAID	Agricultural Productivity Enhancement Project (APEP)	APEP aims to expand rural economic opportunities and increase household income in the agricultural sector by increasing food and cash crop productivity and marketing. Focus <i>inter alia</i> on post harvest handling, strengthening producer organizations, education and awareness programs (including biotechnology). Targeted sectors include <i>inter alia</i> coffee, cotton, spices, maize, rice and floriculture	Allocation to SPS issues not known	2003-2008
USAID	FISH	Activities focus on feed-based technologies and best management practices for Nile tilapia and catfish fish farming. One specific objective is to improve the quality and quantity of available seed and feed in the region.	?	2005-2008
DANIDA	Agricultural Sector Programme Support II (ASPS II)	ASPS II focuses on poverty reduction and household food security to improve the livelihood of small-scale farmers by increasing production in the rural areas. It includes general agricultural education and awareness, financing of an in-house laboratory for honey testing and support to the National Meat Improvement Strategy Plan. Total funding amounts to approximately US\$57m	Allocation to SPS issues not known	2004-2009
IF Window II	TRACE	Capacity strengthening of MTTI - including gap analysis of DTIS Action Plan (ongoing). PMU recently established in MTTI. Project value US\$1m.	Allocation to SPS issues not known	2008-2009
Enhanced IF - Tier 1 and 2	Tier 1 and Tier 2 projects	No information available as to scope. Uganda will need to apply for Tier 1 and Tier 2 funding.	Allocation to SPS issues not known	2009-2013
Regional (EAC/COMESA)				
EC	Lake Victoria Fisheries Management Plan (LVFMP) project	The purpose of developing a Fisheries Management Plan is to sustain the livelihoods of the communities who depend on fishery resources of Lake Victoria and to reduce poverty, food insecurity and unemployment. Includes component on fish handling and storage and upgrading of landing sites. Total budget US\$36m.	Allocation to SPS issues and country allocation not known	2003-2008 (extended for landing site upgrading)
FAO	Management of <i>Bactrocera invadens</i> and other target pests that constrain production and export of fruits and vegetables in East Africa	The project aims to develop and implement in collaboration with international and national partners effective approaches to reduction of fruit and vegetable losses due to fruit fly and MSW infestation. Target countries: Kenya, Tanzania and Uganda.	7,500,000 (seeking funding)	2008-2012
UNIDO/Norad	Trade Capacity Building in Agro Industry Products for the establishment and proof of compliance with international market requirements	The project's objective is to establish a mutually supportive national and regional mechanism to facilitate both inter- and intra-regional trade in selected strategic food products such as fruit and vegetables, fish and honey. Project reformulated to include Rwanda and Burundi. Total project value €3,341,060.	5,300,000	2006-2010
Bill and Melinda Gates Foundation	Support to Small-Scale Coffee Farmers in East Africa	Programme will work with approximately 180,000 coffee farmers earning less than US\$2 a day with goal of improving income through improvement in quality. Implemented by TechnoServe. Regional budget US\$47m.	Allocation to countries and SPS issues not known	2008-2011
STDF	Eastern Africa Centre of Phytosanitary	The objective of the project is to develop a model regional training centre on phytosanitary issues – including creation	800,000	2008-2010

Donor	Project title	Short description	Budget (US\$)	Duration
	Excellence	of a regional pest risk analysis (PRA) unit. Project implemented by CABI, KEPHIS and University of Nairobi (PMU to include regional stakeholders)		
Germany/ PTB	Establishment of Regional Quality Infrastructure in the East African Community (2 nd phase)	The focus of the project is on regional standards harmonization (mainly ISO and TBT-related) including <i>inter alia</i> mutual recognition of conformity assessment procedures and setup of accreditation capacities, strengthening the SQMT coordination function of the EAC Secretariat and revision of the SQMT protocol regarding compatibility with the SQMT Act.	Allocation to SPS issues not known	2007-2010
Germany, Finland, Norway, Sweden and Denmark	EAC Partnership Fund	Budget for 2007/2008 amounting to US\$3.5m. Canada and DFID expected to join in 2008 taking funds up to US\$5m. Reportedly, SPS capacity building might be one focus of future activities to be funded if identified as priority by EAC Secretariat. Proposals for funding to be made by late April 2008.	Allocation to SPS issues not known	2007-2010
AfDB/ COMESA	Agricultural Marketing Promotion and Regional Integration Project (AMPRIP)	SPS activities in COMESA region carried out under AMPRIP with focus on capacity building, establishment of regional reference laboratories, institution of SPS legal framework and establishment of regional technical sub-committee on SPS measures. Reference labs agreed for food safety (Food Technology laboratory, Mauritius), animal health (Veterinary laboratory, Zambia) and plant health (KEPHIS, Kenya). Assessment to identify satellite labs ongoing. Harmonized SPS legal framework (protocol) presented in March 2008 at Ministers of Agriculture meeting and to be adopted in May 2008 by COMESA Council of Ministers. Framework includes reference to COMESA Green Pass (CGP) and contains arrangements for regional reference labs as well as administrative arrangements on overseeing implementation of SPS programmes in region. COMESA Technical sub-committee on SPS measures held first meeting in February 2008.	?	2005- ?
EC	Regional Integration Support Programme (RISP)	This programme aims to develop the capacity of regional trade organisations and their member states in issues relating to regional integration and trade policy. It includes a component of capacity building to develop standards and meet international SPS requirements. Includes rider for COMESA. Total budget €30m.	Allocation to SPS issues not known	2005-2012
USAID	Regional Agriculture Trade Expansion Support (RATES)	Objective is to increase the value and volume of agricultural trade within the East and Southern Africa region and between the region and the rest of the world. Total budget US\$26 million. Among the deliverables are: 1) Regional dairy and maize standards adopted by key countries involved in 80 percent of the regional trade of these commodities 2) COMESA Dairy SPS protocol adopted by the COMESA Council of Ministers meeting in April 2008 and adopted by at least five dairy producing countries by September 2008	Allocation to SPS issues and country allocations not known	Extension until 2008
USAID/ USDA	Support to key SPS policy objectives under the African Global Competitiveness Initiative (AGCI)	The objective is to build capacity of African countries to export plant, horticultural, and animal products internationally (including US). Budget amounts to US\$11.5m over 5 years. Assistance is implemented through USAID's regional trade hub in Nairobi (Kenya) (including regional SPS advisor). Projects for East Africa include: - develop regional phytosanitary information system	11,500,00 allocated to SPS issues Country allocations not known	2006-2011

Donor	Project title	Short description	Budget (US\$)	Duration
		<ul style="list-style-type: none"> - develop appropriate phytosanitary mitigation options for trade - conduct pest risk analyses - facilitate COMESA's activities to build SPS infrastructure - identify and manage SPS problems in East Africa (including fruit fly) - strengthen participation in international standard setting - conduct animal disease risk assessments and identify mitigation measures - identify products with high export potential for which food safety compliance is main barrier 		
Regional (ACP)				
EC	Programme Initiatives Pesticides (PIP-COLEACP)	Project objectives are 1) to enable ACP companies to comply with European food safety and traceability requirements and 2) to consolidate the position of small scale producers in the ACP horticultural exporters sector. Includes in-depth study of the impact of for ACP countries of the new European SPS regulations on official feed and food controls. Total budget €29.1 million. A second phase of PIP is being considered.	Allocation to SPS issues and country allocations not known	Extension until 2008
EC	Trade.com	Support for EPA negotiations and integration of ACP states in world economy. One component focuses on implementation of WTO Agreements and preparation of pilot projects with special attention to SPS and TBT issues. Total budget €50m.	Allocation to SPS issues and country allocations not known	2004-2009
EC	Strengthening Fishery Products Health Conditions in ACP countries	Focus areas are competent authorities, test laboratories, the fish industry and small-scale fisheries. AIDCO is currently preparing tenders for full implementation during extension period. Four teams are expected to be in place by April 2008; Total budget €46m.	East Africa allocation 10,000,000. Individual country allocations not known	Extension until 2010
EC	Participation of African Nations in Sanitary and Phytosanitary Standard setting Organizations (PAN-SPSO)	More effective participation of African countries in the activities of OIE, IPPC and Codex Alimentarius Commission during formulation of international standards on food safety, animal, and plant health. Project implemented by AU-IBAR and AU-IAPSC. Total budget €3.85m. Project to start in November 2008.	Country allocations not known	2008-2010
EC/FAO, ITC, UNCTAD, World Bank	Support Programme on Agricultural Commodities (including cotton)	Strengthen capacities to develop and implement sustainable commodity strategies that improve farmers' productivity and their rural livelihoods and reduce income vulnerability (including <i>inter alia</i> elaborating strategies covering critical parts of the commodities chain; supporting diversification; helping integrate commodities dependent countries in the international trading system). <u>Still under negotiation</u> . Total estimated budget US\$54 million.	Allocations to SPS issues and country allocations not known	2008-2011
EC/AU-IBAR	Support Programme to Integrated National Action Plans for Avian and Human Influenza (SPINAP-AHI)	The project aims to contribute to the socio-economic impact of AHI and the potential loss of human lives and to strengthen national capacities to prevent and control AHI. Expected outcomes include strengthened capacity for early detection and rapid response to AHI at national levels, information and awareness raising activities. Total budget €2.5m.	Allocations to SPS issues and country allocations not known	2007-2010
EC	Strengthening Food	The objective of the programme is to improve the	45,000,000	2008-2012

Donor	Project title	Short description	Budget (US\$)	Duration
	Safety Systems through sanitary and phytosanitary (SPS) measures	contribution of food and feed trade to poverty reduction in beneficiary countries. The aim is to establish risk-based food and feed safety systems for export products ACP countries that are in line with regional, international and EU SPS standards. Tendering process on-going.	(estimated budget). Country allocations not known	
Regional (Africa-wide)				
SIDA	Trade Policy Training Centre in Africa (TRAPCA)	TRAPCA is attached to the Eastern and Southern Africa Management Institute (ESAMI) in Arusha and will provide training through an Executive Masters Programme in Trade Policy and shorter courses, seminars, and workshops (including training on SPS). Total budget amounts to US\$14 million.	Allocation to SPS issues not known	2006-2010

ANNEX II

References

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ANNEX III

Notes to the balance sheet:

The tables presents for each area of food safety, animal and plant health (sections 5-7) the current status and needs of SPS capacities (in general terms), assistance provided by donors and identified gaps with priorities. For each area, there are three sub-components: awareness, regulation and enforcement. In addition to the three areas, there are separate parts for market access (section 4) and overall institutional capacity (section 8). The columns are explained below. The top of the table (section 1-3) is an introduction and summary of the gaps identified - including those gaps that are of most and immediate concern – and a brief note on trends in donor assistance.

Columns

Notes

Status	The capacities are based on existing capacity assessments and evaluations and other available studies (see references in Annex II) and updated in interviews with stakeholders in government, private sector, donor and international agencies (see list of contacts in Annex IV).
Needs	Obtained from the same sources.
Assistance	Donor activities are taken from the projects identified in the research work prepared for the Dar es Salaam Aid for Trade workshop (see references, Annex II) and updated in interviews with donor agencies. A full list of the main planned SPS projects and programmes is included in Annex I.
Gaps	These are needs that have not been addressed by present or forthcoming donor work. The gaps have been discussed and verified in interviews and meetings.
Priorities	Priority scales used: 1 – high and immediate priority; 2 – medium-term priority; and 3 – low and long-term priority

Principles used for prioritization:

- Impact
- Costs and benefits
- Sequencing
- Rule of law: major investment in diagnostics and inspection has to be preceded by legal framework and risk management

ANNEX IV

List of persons met/contacted

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