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CONCISE ANALYTICAL SYNTHESIS

From Margins to Markets:

Revitalising Uganda's Livestock Sector through Institutional Realignment, Regulated Mobility, Inclusive Commercialisation, and Cross-Border Resource Governance

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Abbreviations

AfCFTA – African Continental Free Trade Area

AI – Artificial Insemination

AU – African Union

CBPP – Contagious Bovine Pleuropneumonia

CBT – Commodity-Based Trade

DVO – District Veterinary Officer

DRC – Democratic Republic of Congo

EAC – East African Community

EO – Executive Order

ET – Embryo Transfer

FAO – Food and Agriculture Organization

FMD – Foot and Mouth Disease

GIS – Geographic Information System

GoU – Government of Uganda

HACCP – Hazard Analysis and Critical Control Points

HWC – Human–Wildlife Conflict

IBLI – Index-Based Livestock Insurance

ICPAC – IGAD Climate Prediction and Applications Centre

ICT – Information and Communication Technology

IGAD – Intergovernmental Authority on Development

IGAD–TC – IGAD Transhumance Certificate

KRSU – Karamoja Resilience Support Unit

LC – Local Council

LITS – Livestock Identification and Traceability System

LPZ – Livestock Production Zone

MAAIF – Ministry of Agriculture, Animal Industry and Fisheries

MLHUD – Ministry of Lands, Housing and Urban Development

MVC – Mediation and Verification Committee

NAGRC&DB – National Animal Genetic Resources Centre & Data Bank

NDVI – Normalized Difference Vegetation Index

NDP IV – Fourth National Development Plan

NLCCP – National Livestock–Conservation Coordination Platform

NPA – National Planning Authority
OPM – Office of the Prime Minister
OWC–ECC – Operation Wealth Creation – Economic & Commercial Coordination
PES – Payment for Ecosystem Services
PPCP – Public–Private–Cooperative Partnership
PPR – Peste des Petits Ruminants
QENP – Queen Elizabeth National Park
RSA – Resource Sharing Agreement (Uganda–Kenya)
SACCO – Savings and Credit Cooperative Organisation
SGBV – Sexual and Gender-Based Violence
SPS – Sanitary and Phytosanitary Standards
UAW – Uganda Wildlife Authority
UBOS – Uganda Bureau of Statistics
UDC – Uganda Development Corporation
ULI – Uganda Livestock Industries
UNBS – Uganda National Bureau of Standards
WOAH – World Organisation for Animal Health

Executive Synthesis

Uganda's livestock sector—spanning Karamoja, the Semliki and Albertine rangelands, Northern Uganda, and the national Cattle Corridor—supports over **60% of rural households** and contributes **~17% of agricultural GDP**. Despite this central role, the sector remains trapped in a **fragmented, conflict-prone, low-productivity system** because of entrenched structural weaknesses: insecure land tenure, weak veterinary and SPS systems, unregulated mobility, institutional fragmentation, conservation–livelihood conflict, exclusion from formal markets, and climate-induced rangeland degradation.

The combined July 2025 and September 2025 livestock sector analyses were consolidated into a **single, integrated national transformation agenda**. This agenda is organised around **seven interdependent reform pillars** and backed by a **7-year Indicative Budget of USD 2.18–2.42 billion**, reflecting the scale of investment required to modernise Uganda's livestock economy.

The transformation vision is clear: **shift Uganda's livestock sector from margins to markets**—from informality, ecological fragility, and conflict to a **lawful, traceable, climate-smart, commercially competitive, inclusive, and export-ready system**.

1. Introduction

The report situates Uganda's livestock economy at the intersection of **economic opportunity, culture, ecology, and national security**. Pastoralist communities (Karimojong, Bahima, Basongora, Batuku, Balaalo, Acholi, Langi, Teso) have long depended on mobility and communal grazing systems, yet remain largely excluded from formal policy and modern livestock value chains.

Core constraints include:

- **Land tenure conflicts** and contested ranches
- **Weak SPS and veterinary systems**
- **Mobility-related conflicts** and unlawful settlement
- **Conservation–livelihood tensions** in QENP, Semliki, Karamoja
- **Fragmented institutional mandates** (ULI collapse, weak DLGs)
- **Limited market infrastructure and value addition**

- **Climate variability** leading to rangeland degradation

Executive Orders (2023 & 2025) marked a decisive shift to **regulated mobility and lawful land-use**, setting the foundation for the transformation agenda.

2. Key Structural & Strategic Challenges

The analysis identifies **seven mutually reinforcing constraints**, forming a *systemic crisis*:

2.1 Land Tenure Insecurity

Contested ranches (Aswa, Maruzi, Kiryana, Got Apwoyo); undocumented communal grazing areas; elite capture; no gazetted livestock corridors.

2.2 Conservation–Livelihood Conflicts

Basongora–QENP, Batuku–Semliki, and Karamoja landscapes face intense HWC, predation, crop destruction, and disease spillover due to outdated boundaries and lack of buffer systems.

2.3 Institutional Fragmentation

Collapse of ULI eliminated the commercial backbone; overlapping roles across MAAIF, NAGRC&DB, UWA, UDC, MLHUD, DLGs impede coordinated transformation.

2.4 Weak Veterinary/SPS Systems

Low vaccination, inadequate labs, weak quarantine stations, paper-based movement permits, and absent traceability make Uganda non-compliant with regional SPS standards.

2.5 Unregulated Mobility & Balaalo Crisis

Uncontrolled movement fuels conflict, disease spread, wetland encroachment, and institutional paralysis.

2.6 Market Exclusion & Value Chain Inefficiency

Multiple constraints—absence of sanitary gates, grading, cold chains, dairy hubs, processing facilities, financing—keep pastoralists locked in low-value trade.

2.7 Climate Stress & Rangeland Degradation

Falling NDVI, drought cycles, invasive species, overgrazing, and wetland degradation intensify ecological fragility.

Synthesis:

These constraints reinforce each other:

land insecurity → conflict → unregulated mobility → disease risk → SPS failures → weak markets → poverty loops.

Only **systemic, multi-sectoral reform** can break this cycle.

3. Purpose, Objectives & Expected Outcomes

The report provides a **unified national reform blueprint** aligned with Vision 2040, NDP IV, and OWC–ECC.

Objectives:

- Diagnose structural barriers
- Define a compliance-based mobility system
- Rebuild Uganda’s livestock commercial backbone
- Strengthen veterinary/SPS systems
- Resolve conservation boundary conflicts
- Empower cooperatives, women, youth
- Harmonise cross-border SPS/mobility governance
- Provide a sequenced implementation roadmap

Expected Outcomes:

- Lawful, traceable, fenced, watered, vaccinated mobility
- SPS credibility & export readiness
- Regional market integration (EAC, COMESA, AfCFTA)
- Restored ranches & functional LPZs
- Reduced HWC & land conflict

- Strong inclusion (women, youth, pastoral households)
- Climate resilience through fodder–water systems & NDVI-based planning

4. Methodology & Sources

A robust, multi-layered approach:

Methodological Components:

- Policy/legal review (EOs, Land Act, Wildlife Act, SPS frameworks)
- Institutional diagnostics (MAAIF, UWA, UDC, NAGRC&DB, DLGs)
- Spatial & NDVI-based rangeland analysis
- Veterinary/SPS assessment (labs, traceability, movement permits)
- Socio-economic & inclusion mapping (cooperatives, gender/youth, mobility dynamics)
- Regional benchmarking (IGAD, EAC, COMESA)

The triangulated methodology ensures analytical rigour and feasibility.

5. Structure & Reform Logic

The report flows from **diagnosis** → **reform architecture** → **operational chapters** → **opportunities** → **risks** → **recommendations** → **roadmap** → **budget**.

This ensures clarity, coherence, and implementability.

6. Reform Pillars for Livestock Transformation

The transformation framework consists of **four core pillars** and **three complementary pillars** forming **one integrated ecosystem**:

6.1 Core Pillars

Pillar 1: Institutional Realignment

- Reconstitute ULI under **NAGRC&DB–UDC**
- Convert government ranches into **LPZs** (Aswa, Maruzi, Got Apwoyo, etc.)
- Digitise ranch audits & land governance

- Embed SPS, traceability, feedlots, fodder hubs, and processing within LPZs

Pillar 2: Regulated Mobility

- Enforce EO 2 & 3 (2023/2025)
- Mandate fencing, water, paddocking
- Roll out **LITS + e-permits**
- Establish sanitary gates & district grazing plans
- Gazette livestock corridors and dry-season reserves

Pillar 3: Inclusive Commercialisation

- Strengthen cooperatives with 30–40% women/youth quotas
- Expand livestock finance (SACCO credit, IBLI insurance)
- Roll out grading, dairy hubs, cold chains, eco-labelling
- Integrate pastoralists and smallholders into LPZ-driven value chains

Pillar 4: Cross-Border Resource Governance

- Implement IGAD–TC; harmonise SPS with Kenya, South Sudan, DRC
- Upgrade border sanitary gates
- Strengthen peace markets & cross-border security coordination

6.2 Complementary Pillars

Pillar 5: Productive Conservation & Boundary Realignment

- Rationalise boundaries (QENP, Semliki, Karamoja)
- Establish multi-use buffers, predator-proof kraals, riparian restoration
- Introduce **compensation-with-compliance** frameworks

Pillar 6: Veterinary & SPS Backbone

- Modernise Gulu, Soroti, Moroto, Mbarara labs
- Upgrade quarantine stations & sanitary gates

- Scale vaccination & roll out LITS
- Implement HACCP+ & CBT (Commodity-Based Trade)

Pillar 7: Northern Uganda Flagship Corridor

- Convert Aswa–Maruzi–Got Apwoyo belt into an integrated demonstration corridor
- Build a regional vet laboratory, forage/water systems & cross-border markets
- Align with South Sudan & DRC SPS/trade systems

7. Institutional Realignment

This section details the collapse of ULI, the fragmentation of ranch governance, and the emergence of LPZs as the **new commercial nucleus**.

Expected results include:

- Restored breeding & finishing capacity
- Transparent land governance
- Lower transaction costs
- Commercial discipline
- SPS enforcement & export readiness

Each LPZ also anchors district-level mobility control, veterinary services, SME clusters, and inclusive commercialisation.

8. Regulated Mobility

Unregulated mobility has become a major vector for conflict, disease, ecological degradation, and SPS non-compliance.

This section operationalises:

- EO 2 & 3 mobility rules
- Mandatory fencing, paddocking, water development
- Sanitary gates as compliance checkpoints
- Lawful access via MVCs

- NDVI-based drought movement planning
- Integration of Balaalo through lawful, verified, fenced systems
- Corridor gazettement

Mobility becomes an **orderly, traceable, SPS-compliant** system.

9. Human–Wildlife Conflict & Conservation Reform

Key hotspots: QENP–Basongora, Semliki–Batuku, Karamoja.

Reforms include:

- Boundary adjustments
- Buffer zones
- Predator-proof kraals
- Buffer water systems
- Riparian restoration
- Compensation-with-compliance
- SPS–HWC integration

These measures stabilise conflict zones and enable coexistence.

10. Northern Uganda: Fragility & Promise

Northern Uganda is the **demonstration corridor** for national livestock transformation.

Opportunities:

- Largest public ranches
- Proximity to South Sudan & DRC markets
- Youthful labour force
- Strategic corridors (Karuma–Gulu–Elegu, Hoima–Buliisa)

Priorities include LPZ development, land audits, SPS strengthening, cooperative transformation, and cross-border market integration.

11. Cross-Border Resource Governance

Cross-border mobility and trade require:

- IGAD–TC rollout
- SPS harmonisation
- Joint vaccination calendars
- Upgraded sanitary gates
- Formalised peace committees & corridors

Stabilising frontier regions enhances SPS reliability and regional market access.

12. Inclusive Commercialisation

Core pathways:

- Cooperative restructuring
- Gender & youth inclusion
- Access to finance (SACCO credit, IBLI)
- Market infrastructure & grading systems
- Eco-labelling incentives
- SME value-chain clusters

Commercialisation must be **equitable** to secure social legitimacy and compliance.

13. Strategic Opportunities

Seven investment domains offer rapid, high-return transformation:

1. Fodder & water systems
2. Technology & innovation (LITS, NDVI, AI/ET)
3. Value-chain industrialisation
4. Export market integration (CBT, SPS-compliant hubs)
5. Climate-smart livestock systems

6. Productive conservation & eco-labelling
7. Northern Uganda Flagship Corridor

These opportunities operationalise the seven pillars.

14. Risks & Mitigation

Risks span governance, institutional, social, economic, SPS, environmental, and cross-border domains.

Mitigation includes:

- Digital land audits
- MVC oversight
- NDVI drought codes
- SPS laboratory upgrading
- Boundary co-management
- Peace committees & joint security units
- Cooperative governance reforms

A national risk dashboard supports continuous monitoring.

15. Policy Recommendations

Recommendations align directly with the seven pillars, focusing on:

- ULI–NAGRC&DB institutional integration
- Mobility compliance
- SPS strengthening
- Cooperative reform & SME scaling
- HWC reform
- Northern Corridor development
- Export systems & cross-border harmonisation

16. Implementation Roadmap

A three-phase national rollout plan:

Phase I (0–12 months): Stabilisation & Foundation

- Ranch audits, ULI restructuring
- LITS pilots, e-permits
- Vaccination & sanitary gates
- Early HWC reforms
- Cooperative restructuring

Phase II (1–3 years): Systems Integration

- LPZ construction
- National LITS rollout
- SPS laboratory upgrades
- Buffer-zone & boundary reform scaling
- Dairy hubs, live-weight markets, SME clusters

Phase III (3–7 years): Export Competitiveness

- Full LPZ rollout
- CBT export facilities
- Climate-smart grazing & NDVI-based planning
- Full IGAD–TC implementation
- Regional SPS harmonisation

17. Indicative Budget Integration

The **7-year Indicative Budget (USD 2.18–2.42B)** is aligned to the entire transformation agenda and embedded into the reform architecture:

By Phase

- **Phase I:** USD 280–350M
- **Phase II:** USD 820–960M
- **Phase III:** USD 1.08–1.11B

By Pillar

- Institutional Realignment: **\$740–795M**
- Veterinary & SPS Backbone: **\$470–525M**
- Inclusive Commercialisation: **\$300–345M**
- Regulated Mobility: **\$250–300M**
- Cross-Border Governance: **\$230–260M**
- Productive Conservation: **\$140–165M**
- Northern Corridor: **\$270–315M**

Financing Strategy

A blended model leveraging:

- GoU budget & OWC–ECC allocations
- UDC + PPCP investments
- Development partners (AfDB, IFAD, EU, WB, USAID)
- Climate funds (GCF, GEF, Adaptation Fund)
- Private sector (processors, ranchers, SMEs)

The budget transforms the reform architecture into a **bankable national programme**.

18. Conclusion

By addressing structural barriers and investing USD **2.18–2.42 billion** across seven pillars, Uganda can build a livestock system that is:

- **Traceable & SPS compliant**
- **Inclusive & commercially competitive**
- **Ecologically balanced & climate resilient**
- **Peace-enhancing & regionally integrated**
- **Capable of export readiness under EAC, COMESA & AfCFTA**

The transformation from “**margins to markets**” is a national opportunity—achievable through disciplined implementation, inter-ministerial coordination, and sustained political leadership.