

# Final Report Senegal Fact-Finding Mission 13-17 March 2023

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# 1. INTRODUCTION

The Senegalese poultry sector was selected through a study by Sense, a research consultancy firm, regarding the most promising value chains. A [poultry value chain analysis report](#) was written and formed the basis of a digital trade mission in April 2021. The recommendations from the study and the interest aroused by the digital agricultural trade mission led to the creation of a working group made up of Senegalese and Dutch poultry companies in order to identify the challenges of the sector and to see the actions and contribution of Dutch expertise in the field. Following the Senegalese and Dutch working group on the poultry sector in Senegal, it was proposed to invite key members of the working group to the [VIV Europe 2022](#), as well as to organise a fact-finding mission to Senegal which would allow Dutch companies to see the realities of the sector at local level, and to be able to develop appropriate proposals.

The poultry fact-finding mission was part of the results set out in the embassies annual plan, namely the strengthening of the poultry sector in Senegal, following the recommendations of the [report of the working group](#) on the development of the poultry market. To continue and strengthen the relations and develop concrete projects this fact-finding mission to Senegal was essential. In the new Dutch BHOS (foreign trade and development cooperation) policy brief, Senegal is marked as a combination country in which trade and development cooperation go hand in hand.

This mission to Senegal took place from 13<sup>th</sup> to 17<sup>th</sup> March 2023 and was organised by the NABC in close cooperation with the Embassy of the Kingdom of the Netherlands in Dakar, the Netherlands Enterprise and Development Agency (RVO) and the Agricultural Council for Senegal and Côte d'Ivoire. The mission was originally scheduled for October 2022, however, postponed to 2023 because targeted participants had other priorities at the time. In response, more efforts and thus hours were put into acquisition and promotion. It paid off as 8 Dutch companies participated in the mission. It could have been 10 but two had to cancel last minute.

The fact-finding mission proved to be a good momentum to re-energise Dutch and Senegalese relations and to place emphasis on poultry value chain development in Senegal. The mission specifically focused on: slaughter and processing of poultry; product conservation, cold chain control, transport, logistics; waste management; and poultry feed production. Initially, egg processing was also part of the programme but no company in this part of the value chain showed interest (e.g. Sanovo). Given the 300 000 eggs per day minimum target and the difficulty to optimally use machinery, an egg processing plant in Senegal is not (yet) viable.

In the technical offer of July 2022, a clear planning was outlined regarding mission preparation, execution and evaluation. This report provides a description of the mission preparation, activities, evaluation, as well as the follow-ups, and financial report. For detailed additional information see Annexes.

## 2. DELEGATION

In total, ten companies agreed to participate in the mission. Two companies (Pas Reform and I Grow Chicken) unfortunately withdrew their participation just a few weeks before the mission due to other commitments. Table 1 lists all the companies and participants that joined the mission.

**Table 1: Overview of the participants**

Company name	Product/service	
1 Angel Eggs	Broiler hatching eggs	Jeroen Engelen
2 Bincx	Buildings (e.g. slaughterhouses, sheds)	Gerbrand van den Brink
3 Celtic Cooling	Cold chain solutions	Rens Elferink
4 Chore-Time Europe	Solutions for poultry and egg production	Chinedu Onuegbu
5 Lionpro	Trading company of animal and vegetable protein	Martins Spridzans
6 Marel Poultry	Slaughter and processing equipment	Lambert Rutten
7 Marel Water Treatment	Industrial treatment of process wastewater	Eric Nab
8 Transnational Agri Projects	Slaughterhouse equipment (new and refurbished)	Inge van der Wolf

The infographic displays the following participants and their details:

- Angel Eggs:** Jeroen Engelen, Director. Description: The international orientation of Angel Eggs B.V. enables the company to deliver high-quality hatching eggs to customers worldwide.
- BINCX:** Gerbrand van den Brink, Business Development Manager. Description: Bincx B.V. designs, manufactures, and assembles steel constructions and sandwich panels for roofing and walls.
- CELTIC COOLING:** Rens Elferink, Sales Manager. Description: Celtic Cooling B.V. is a worldwide supplier and installation company for cold rooms, freezers and refrigeration equipment.
- CHORE-TIME:** Chinedu Onuegbu, Regional Sales Manager West Africa. Description: Chore-Time develops and manufactures complete solutions to maximise poultry and egg production.
- LIONPRO:** Mārtiņš Spridzāns, Head of Business Development for West Africa. Description: Lionpro B.V. is one of the top 5 animal and vegetable protein and fats trading companies in Europe.
- Marel Poultry:** Lambert Rutten, Sales Manager. Description: Marel Poultry B.V. is the leading global provider of advanced poultry processing systems and services.
- Marel Water Treatment:** Eric Boudewijn Nab, Industry Sales Manager. Description: Marel Water Treatment B.V. is specialised in the industrial treatment of process wastewater and sludge and has extensive and advanced knowledge of industrial production processes.
- TransNational Agri Projects B.V.:** Inge van der Wolf, Sales and Marketing Director. Description: TransNational Agri Projects B.V. supplies slaughterhouse equipment. Slaughterhouses buy both used (reconditioned or refurbished) and new equipment from the company.

# 3. PREPARATION

## 3.1 Acquisition & promotion

Initially, the intention was that the Dutch companies that participated in the Senegal Working Group would join the mission. There was intensive communication to gauge their interest and based on their feedback, a mission date was set: 17-21 October 2022. After discussions with the commissioning authority (RVO), it was then decided to also target more companies active in the poultry value chain. An extensive lead list of poultry companies potentially interested in Senegal was created based on the NABC database and additional desk research. An informative flyer about the mission and business opportunities was prepared and shared with all the companies on the lead list to generate additional interest; as well as the [Senegal Value Chain Study - Poultry](#) and the [Senegal Working Group Report](#). In addition to personalised mailings and callings, additional promotion of the mission took place via partners, publications on websites such as [agroberichtenbuiteland.nl](#), RVO's website, and NABC's newsletters and Social Media channels to support the promotion efforts. It resulted in the engagement of only 3 companies (Bincx, Choretime and I Grow Chicken). The reasons for this low response were:

- Did not fit their schedule (trade fairs in India, Bangkok, and Middle East). If possible, they would like to know far in advance when these kinds of missions will take place.
- Shortage of personnel, so they chose to focus on clients (and thus countries) that can soon sign contracts.
- Demand in the European market is picking up, so they prefer to stay closer to home.
- Catching up on overdue work.

On this basis, it was then decided together with the RVO to postpone the mission.

From 1 November 2022, Núria Vlonk-Cunha Soares became the new coordinator of the [Dutch Africa Poultry Platform \(DAPP\)](#) and discussed this mission in detail with the members during the last annual meeting (in December 2022). A dedicated mailing was also sent out to members of the [Dutch Poultry Centre \(DPC\)](#). The lead list was updated, which resulted in a list of 72 companies active in the poultry sector and interested in Africa and the themes that emerged from the Working Group sessions. All these 72 companies received multiple dedicated mailing and all of them were called to discuss the mission and determine their interest in participating or not. In the end, 10 companies agreed to participate and 8 actually signed up.

## 3.2 Preparation

A **practical information guide** (see Annex XIV) with information on the COVID-19 situation, local transport, visa, recommended flights and programme was created in January 2023 and shared with all registered participants. After the intake profiles were received, a **mission brochure** (see Annex I) was created in English and French which included all company profiles (name of the participant(s), contact details, company description, profile picture and company logo), as well as a foreword by the Embassy and contact details of the RVO and Agricultural Council. The NABC brought 120 hardcopy versions of the mission brochure to Senegal for distribution. A preparation meeting was scheduled for the interested companies on the 6<sup>th</sup> of March of 2023.

# 4. IMPLEMENTATION

## 4.1 Arrival Day: Sunday 12 March 2023

On Saturday, Lambert Rutten (Marel Poultry) informed Núria Vlonk-Cunha Soares that he would not be able to travel due to health reasons. He arrived from Algeria quite ill and would not recuperate on time. However, he indicated wanting to remain in the Whatsapp group that was created, to keep abreast of all the activities, photos and local contacts.

Sunday evening, the 13<sup>th</sup> of March, the majority of the mission participants arrived in Dakar. Except from Jeroen Engelen (Angel Eggs) and Rens Elferink (Celtic Cooling). Their flight was cancelled due to a strike at Brussels Airport. Jeroen arrived a day later, on Monday evening. Rens, on the other hand, arrived only on Tuesday evening (unfortunately after the network cocktail).

## 4.2 Day 1: Monday 13 March 2023



### *Netherlands Embassy in Dakar*

The first day of the Senegal Poultry Fact-Finding Mission started with the warm words of welcome from Rogier Hekking, Deputy Head of Mission, at the Netherlands Embassy in Dakar. Apart from the delegates and NABC, also present were Hanneke van Hoof (Private Sector Development Coach Senegal, RVO), Arno Rohde (Ministry of Agriculture, Nature and Food Quality), Ben Kubbinga (Agricultural Counsellor) and Viviane Faye (Agricultural Advisor).

### *Ministry of Livestock and Animal Production*

After a brief introduction, the delegation travelled to Diamniado to an audience with the Senegalese Minister of Livestock and Animal Production and H.E. the Dutch Ambassador Ms. Joan Wiegman. H.E. Minister Mr. Diop stressed how pleased he was with the arrival of this delegation. This mission is in line with Senegal's efforts to achieve food sovereignty. A ban on chicken imports instituted in 2005 means that the poultry consumed is locally produced. But more knowledge, technology and investments are needed to sustainably develop the value chain. This is where Dutch companies active in poultry, which are among the best in the world, can make a valuable contribution. Especially in the area of hatching eggs. Senegal imports 90 million eggs a year. This makes the country highly dependent on other countries, including the Netherlands, with all its consequences (bird flu). Same applies for poultry feed. H.E. Ambassador Ms. Wiegman thanked the Minister and delegates and indicated that this mission will strengthen the bilateral relationship between both countries. The timing could not have been better!



The discussion subsequently continued with the ministry's technical staff. Mr. Ousmane Mbaye (Secretary General) presided the meeting. Doctor Makhtar Diouf gave through a presentation the current situation of the poultry sector in Senegal. A number of delegates then pose their questions to the ministry:

- Eric Nab (Marel Water Treatment): production of chicken has grown but Senegalese are not eating much more chicken. So, this growth is because they have closed the boarder. Chicken meat remains expensive, and the consumer makes strategic choices. It varies between fish, chicken, and red meat.

Answer: see the strategy of food sovereignty. The Senegalese Government aims to work more with the private sector. Chicken meat needs to become affordable.

- Eric: only 20% of the chickens are slaughtered in proper slaughterhouses. What is the Government's regulation on that? How to force people to slaughter at the official slaughterhouses? This also entails food security. If there is no traceability, an outbreak cannot be controlled.

Answer: it is a process. We need first a good infrastructure and only then policies can be enforced. It is a step-by-step process: sensibilisation, training, awareness.

- Inge van der Wolf (TransNational Agri): small abattoirs are private owned while the Ministry performs the phytosanitary check. Any funds available?

Answer: yes, there is programme to support small abattoirs and to prove that it is financially viable to invest in them.

- Hanneke van Hoof (RVO): she informs that the RVO has different (financial) instruments available to support value chain development: e.g. demonstration projects (impact clusters), feasibility studies, etc. Additional information regarding the instruments available will be later sent.

- Chinedu Onuegbu (Chore Time): regarding animal welfare, production system, environmental matters. Does the government have policies in place?

Answer: previously there was no concern about animal welfare. There is a law in progress which in line with WHO directives. Africa is quite late but trying to rush. We also look at the latest developments on regional level. In fact, it is a process.

Reaction of Ben Kubbinga (Agricultural Counsellor): the Netherlands can definitely provide support in sustainability-related matters. We have a lot of knowledge and experience within this field.

- Chinedu Onuegbu: are there any policies regarding egg process production?

Answer: production varies and not only seasonable but also per year. In 2016 there was a drastic decrease due to the bird flu, while in 2017 a significant growth was experienced. Variations are normal. Vaccination is one of the solutions for stabilisation (diseases prevention).

*Field visit: Avi Sénégal (slaughterhouse)*

The slaughterhouse was set up in 2008 by 2 Italian brothers. Till 2016 they also had their own production combined with the slaughterhouse, however, the bird flu in 2016 threw a spanner in the works and they had to cease their own production. Currently they only serve as a slaughterhouse (buy from farmers) and they sell the chicken frozen. Customers pick up the chicken themselves.



*Field visit: Avisen (feed mil/factory)*



The company is French-Senegalese. It became operational in 2000 (feed mill), the turnover is 53 million a year and employs 100 persons. The production is fully absorbed by the national market. 75% of the mix is imported (raw material). Only 4 imports per year. On one vessel one might find imports for the other competitors: NMA and SEDIMA. Fish flower was previously used but it became too expensive. Feed accounts for 70% of the costs.

Avisen opened 3 years ago its slaughterhouse. Currently small: 1,000 birds an hour but meets all international standards. Customers are very demanding. Therefore, they closely work with farmers to better control de quality.

They are open for collaboration. In two years time they would like to build their own chicken houses.





#### 4.3 Day 2: Tuesday 14 March 2023

*Interprofession Avicole du Sénégal (IPAS)/Fédération des Acteurs de la Filière Avicole (FAFA).*

The meeting took place at the Headquarter of CIMEL (Centres d'Impulsion et de Modernisation de l'Elevage) in Mbao.

Programme:

1. Presentation by IPAS
2. Presentation by FAFA
3. Presentation by NABC (delegates and outcomes of the Working Group & goals mission)
4. Explanation about the challenges in the poultry sector by IPAS/FAFA
5. Discussion, Q&A:
  - a. There is no VIV in West-Africa. For 2024, IPAS would like to organise a big poultry trade show and would like to work together with Dutch companies where they can present their product and services.
  - b. Most of the production is along the coast (colder climate) but as the land becomes more scarce, farmers need to move inland where it is hotter (towards east). According to Gerbrand van den Brink (Bincx) this should not pose a problem. He has several ongoing projects in Saudi-Arabia which has a hotter climate. As long as it is a closed farm.
  - c. IPAS would like to sign a MoU with the Dutch Poultry sectorial organisation. Concrete joint action points must be leading.
  - d. Concrete leads:
    - Promotion of more hatching eggs farmers (currently only 4 farmers). Bincks is presently building 6 breeding houses in Cameroon.
    - More focus on further processing of chicken meat.
    - Cold chain solutions need to be found. COVID-19 exposed this problem. 3 million chickens had to be destroyed due to the lack of a workable cold chain.
    - More private investments are needed as banks barely provide loans.
    - IPAS built a brand-new training centre in Diamniado. Training is needed.
- Eric Nab (Marel Water Treatment): why invest in big slaughterhouse while one is competing with the mini-abattoirs (80% of the market)?
  - Higher standards even if it's more expensive. Middle class have higher requirements. Quality is becoming more and more important.
  - Inge van der Wolf (TransNational Agri) adds: young people do not slaughter living chicken anymore. We are dealing with a new generation.
  - Government policy: food sovereignty
- Inge: the objective is to develop the value chain but concretely, how is IPAS thinking to contribute? Also variation in terms of members, how to serve them?
  - Help the small farmers to grow. Lobbying and inform. The Government needs to provide land and financial support, requirements that need to be met.



- In January 2023, IPAS organised together with the Senegalese Government an investment forum to attract more investments into the poultry sectors. Big banks and key governmental structures were present. The focus was on breeding, closed housing and tax exemptions.
- Hanneke van Hoof (RVO): business case hatching eggs available. Impact cluster Congo: centre de formation. Need to build another one in Senegal? 50% is a grant. What are the common grounds on which Dutch and Senegalese companies can cooperate and is it innovative? More information will be shared.
- Ben Kubbinga closes the meeting and thanks everybody for the participation. This meeting forms a basis for further collaboration. He also informs about the SARA which will take place in Abidjan. On September 30<sup>th</sup> the Netherlands will be the pays de l'honneur.

### *Networking Cocktail*

The Networking Cocktail took place at the Residence of the Dutch Ambassador in Dakar (16h30-18h30). A total of 50 Senegalese representatives signed up for the cocktail (see Annexe V). This list was shared with the delegates prior to the cocktail.

Due to political disturbances on that day, it was not easy to enter or leave the city in the afternoon. As a result, a large number of registrants passed up the event and about 25 representatives eventually showed up.



#### 4.4 Day 3: Wednesday 15 March 2023

##### *Field visit: SEDIMA headquarter, hatchery and slaughterhouse*

The company exists for over 40 years: 2 feed mill factories, hatchery (1992: 40 incubators, 30 million chicks per year), slaughterhouse, and own production. SEDIMA already works with Marel Poultry and Marel Water Treatment.



The delegation received at SEDIMA's headquarters a presentation about the company. It then travelled to the hatchery in Notto and subsequently visited the abattoir. The delegation greatly appreciated that SEDIMA allowed a physical visit to the hatchery (however, after a shower). A number of delegates (Marel, Bincx and Celtic Cooling) noticed areas for improvement at the abattoirs and shared this information with those in charge. Further exchange between the companies will take place.

##### *Fiara-fair*

Due to political unrest, the delegation was advised by the Dutch Ambassador to avoid a visit to the FIARA-fair.

Jeroen Engelen (Angel Eggs) departed to the Netherlands on Thursday evening.

#### 4.5 Day 4: Thursday 16 March 2023

##### *Field visit: AVIVET (production and small hatchery)*

Dr. Ibrahima Sall is the owner of AVIVET. He is a member and head of the hatchery department within IPAS. The company owns 8 poultry houses and a small hatchery. It currently produces 15.000 birds but would like to double soon. Dr. Sall already works with Hendrix Genetics (Sasso chicken). The delegation received a tour.



#### 4.6 Day 5: Friday 17 March 2023

##### *Mission evaluation, closure and follow-ups (Novotel)*

The last day of the mission was dedicated to evaluation of the mission and to discuss the follow-ups.

Programme:

- 1) Feedback by delegates regarding the mission (evaluation):
  - a. See Annex III.
  - b. Bincx: no contacts at arrival but is now leaving with valuable contacts. Good small group of delegates. Regarding the follow up, the focus should be on hatcheries and slaughterhouses.
  - c. Celtic Cooling: missed the cold chain aspect in the programme and would like to see a platform being developed to connect the members of the working group and the delegates of the mission. Once the basics are in place, it can be fleshed out further.
  - d. Chore Time: the timing was perfect given the current policy on food sovereignty being implemented by the Senegalese Government. It was good to hear and see the challenges the sector is facing. The mission provided a good impression of what is taking place on the ground and the business opportunities. It was a shame we did not visit the FIARA-fair.
  - e. Lionpro: this mission was very valuable. He was able to meet the big players in his field and to get an impression of the sector. Matchmaking was a bit too short. More tailormade visits next time.

- f. Marel Water Treatment: great group of delegates. Matchmaking was a bit too short. His objective was achieved; to see what is happening on the ground.
  - g. TransNational Agri: good mission with a sound focus. Missed the DAPP-member Pas Reform. They could have been of added value (hatcheries). Would like to see a follow up from the RVO/LNV/Embassy. More matchmaking next time.
- 2) Access to finance (Invest International):
- a. See Annex XIII.
  - b. Inge van der Wolf (TransNational Agri) would have liked to know the difference between Invest International's pre-investment support and the investment preparation projects DHI scheme of the RVO.
- 3) Discussion regarding outcomes of the mission and next steps (all):
- a. Inge: what is the financial support of the Ministry of Livestock and Animal Production to the sector?  
Answer: a fund of 4 billion FCFA (guarantees or loan). The Government's policy on food security will be shared with the delegates.
  - b. The Senegalese parties emphasise the focus should be on:
    - i. Cold chain solutions.
    - ii. Waste management: how to transform chicken manure? No collaboration yet between the Ministry of Livestock and UCG (Aviboy in Saint-Louis) to collect and transform waste. What are the options for collecting waste at farm, hatcheries, and slaughterhouses? Is it financially viable?
    - iii. Knowledge transfer/training; very important!!!
    - iv. Quality control.
    - v. More slaughterhouses will open in the coming years, and they need to be equipped.
    - vi. Setting up mother hen houses.
    - vii. Hatcheries.
    - viii. The training centre in Diamniado is not yet finished. There is still 2 million EURO available to build a second one to be equipped with materials for hatchery and abattoir.
  - c. The Dutch delegation emphasises the focus should be on:
    - i. Structuring the chain: small, middle and big actors. Which actions apply for each level?
    - ii. Build a slaughterhouse according to international standards where different actors can come and let their chicken be slaughtered (and further processed). Will also serve as an example project (training). Demonstrates to banks and private investors that such projects are financially viable.
    - iii. Lack of an integrated chain in Senegal. In Kenya, as soon as a farmer has 30K-60K chicks he/she builds a slaughterhouse. Till 150K chicks TransNational Agri can deliver the material. Higher, then Marel Poultry.
    - iv. Collaborations can take place in different ways, but the level is important. Government (macro), sector organisations (meso) and companies (micro).

It is important to think about how quickly one wants to achieve the objectives and which actors are needed to do so.

- v. Focus on the start of the value chain: breeding and hatchery. Education and training is key and lasts. Train veterinarians (train-the-trainers).
- 4) Closure by Rogier Hekking (Netherlands Embassy)
- 5) Closure by Núria Vlonk-Cunha Soares (NABC)
- 6) Lunch together

After the lunch, Núria Vlonk-Cunha Soares had a short brainstorm session with the delegates regarding what could be done after the mission. More about this in chapter 6.

# 5. EVALUATION AND LESSONS LEARNT

**Table 2: Overview of the participants' needs and expectations**

Company	7. Angel Eggs B.V.	1. Bincx B.V.	4. Celtic Cooling	8. Chore-Time Europe B.V.	2. MareL Poultry	3. MareL Water Treatment	9. Lionpro BV	5. Transnational aGri
Delegate	Jeroen Engelen healthy food which the start of the healthy chick.	Gerbrand van den Brink	Rens Eiferink	Chinedu Onuegbu - Long-term poultry sector development projects (could be from the government agencies, private investors)	Lambert Rutten in the coming years.	Eric Nab	Martins Spridzans Meeting and connecting with other stakeholders on the animal feed industry as well as logistics.	Inge van der Wolf
Products for the Senegalese market	High quality broiler hatching eggs, of both the Ross 308 and Cobb 500 breed, produced and packed in the Netherlands and transported all over the world.	Turn key and tailor made agricultural buildings designed of steel with sandwich panels on the roof and walls. Besides the building itself, we can add also doors, windows, loading docs etc. Final part of our turn key solution is that we can include electrical and plumbing work.	To create the best circumstances to store your products	Our core products are poultry systems for optimized poultry farming. These includes: ✓ Broiler, Turkey (feeding & drinking systems) ✓ Layer cage systems ✓ Breeder nests ✓ Ventilation & Climate control ✓ Feed storage and feed filling systems	The full line equipment for poultry slaughterhouses and convenience products from 500 birds/hour onwards.	MareL Water Treatment B.V. is specialised in the industrial treatment of process waste water and sludge and we have extensive and advanced knowledge of industrial production processes. We can therefore provide our clients with tailored solutions for all phases of a production process, for both partial flow and complete end of pipe projects.	We are currently not present in Senegal, but want to research the market for potential entry. In Africa we are currently present in 9 countries (Kenya, Uganda, Rwanda, Tanzania, Mozambique, Zimbabwe, Zambia, Nigeria, Côte d'Ivoire) with supply chain management business. Our primary imported products are animal feed ingredients.	TransNational Agri Projects supplies slaughterhouse equipment. These slaughterhouses buy both used (reconditioned or refurbished) and new equipment from us. Our range of machinery consists of: - Equipment and/or complete slaughter lines for cattle, pigs and sheep - Equipment and/or complete slaughter lines for chickens - Edible by-products cleaning machines - Meat meal production equipment (Vth quarter)
Experience in Senegal to date	We currently sell hatching eggs in the African market. For example to Senegal and neighbouring countries Mali, Ghana and Ivory Coast. And we would like to expand our sales in Africa.	Nothing so far in Senegal. In Africa, we did projects in Ghana, Ivory Coast and Ethiopia	Already selling to a few local companies	Chore-Time recently has been in touch with two stakeholders from Senegalese poultry industry. However, we want to further explore the market potentials.	We are active in Senegal since over 10 years and have delivered and installed a prime poultry meat processing plant in Senegal that is a reference in the region.	Currently no experience in Senegal.	Currently no experience in Senegal.	We have contacts, but no sales recently
Which local companies to meet	High quality hatcheries with knowledge about producing healthy day old chicks that are sold to local farmers. This can be both large and small scale operations. Besides that we would like to meet logistical companies with experience transporting eggs within Senegal.	Come in contact with potential clients; prospects who have in mind to start an agricultural project	Potential customers active in markets transport/storage/warehouse, pharma/potato/onion, fruits and vegetables, slaughterhouses, with a need for insulated panel structure for cold storage with/or a refrigeration installation, where local installation is needed with reliable components	Poultry Producers and hatcheries (Industrial and Medium scale) Poultry project Integrators Poultry equipment distributors Financial Organization offering Credit Facilities to Poultry Producers Poultry Association Chair - SEDIMA Group - AviSenegal - Avivet - ProDas - Jai Laxm	Sedima  Other poultry meat processing companies  Big(ger) poultry producers that now only sell their live broilers to the market but are exploring to start setting up a slaughterhouse.	Information not available	Animal feed producers e.g. Sedima, Olam, NMA Sanders and FKS Mills and others.  Distributors of animal feed or its ingredients or related products.  Logistics agents.	See list sent by us
When would the mission be a success	When we were able to get to know the local market including the hatching egg demand in Senegal and/or neighbouring countries. And if we got to know local hatcheries with who we can work together in the future.	If I come in contact with potential customers that I can offer buildings sooner or later and finally delivery the equipment	Good understanding of the market, connection with delegates and local companies	-New leads (Projects) - Potential distribution partnership - Establish contact key stakeholders and decision makers - Get a clearer picture of the Senegalese poultry industry	If as much as possible potential (short and long term) customers could be met.	Information not available	If we manage to get better understanding of the market and get any leads for potential clients and partners.	Difficult to see . Of course everybody wants to sell and advise new potential clients , but we have to be realistic. Building up a good network and it is important for us that our potential clients learn to know us

Prior to the mission, a survey was sent out to the delegates in which they had to indicate what their expectations and needs were regarding the mission, and when would the mission successful for them. Table 2 shows the results of the survey. On the last day of the mission, delegates completed the Mission Evaluation Form (see Annex III). It can be concluded that from their viewpoint, the fact-finding mission was largely successful.

However, there are some key points to consider when preparing a following mission:

- Although the delegates are on a mission, the 'normal' work continues. The programme was quite full and difficult to combine with incoming requests from the headquarters in the Netherlands.
- It would have been a good idea to connect with the chamber of commerce, more sectoral organisations.
- More focus on controlling the cold chain.
- More time for the networking reception would have been appreciated. As well as individual networking (in other words, matchmaking).

## 6. FOLLOW-UP

Based on needs of the Senegalese parties and the extent to which Dutch companies can support them, three possible business cases can be identified.

### 1) *Biosecurity and hygiene at the abattoirs: training and capacity building*

Ms. Coumba Kebe Gueye of the Ministry of Livestock and Animal Production (DSR/DSPV) indicated that the Ministry has limited resources to monitor and more importantly assist the small abattoirs (80% of the market) in terms of proper sanitary practices. This is mainly because inspectors lack this knowledge. This challenge could be partly overcome by providing training to inspectors (capacity building). AERES but also companies like Transnational Agri could provide these trainings.

### 2) *Feasibility study for collecting and rendering waste materials:*

Contrary to expectations, even the big slaughterhouses are unable to process/reuse their waste at full capacity. SEDIMA processes only 100 tonnes a year and that is only a fraction what it should be able to do. At the farm and hatchery level many farmers do not know what to do with their waste. They throw it away with the normal rubbish or they just bury it. This same procedure is applied by the small slaughterhouses. They dispose of feathers and intestines in an unsustainable way. The following questions should be answered through a feasibility study. There has been contact between NABC and [Mavitec](#) (took part of the working group: waste management) to find out if this idea is feasible.

- From whom should the waste be collected: farms, hatcheries, slaughterhouses, or all 3?
  - *Mavitec: from all three, and beyond, dead animals, hatchery waste, etc.*
- How many of these exist and where are they situated?
  - *Mavitec: this can be the 3 items separately (blood, intestines , feathers) or all mixed together.*
- What is the type of waste available?
  - *Mavitec: the most is from an abattoir of chicken, cattle, pork(?), turkey, ducks, etc.*
- How many kg/tonnes of waste is available?
  - *Mavitec: subjected to size of the abattoir(s).*
- Depending on the type of waste, how and where should it be processed, and for which ends (e.g. protein meal, animal feed)?
  - *Mavitec: subject to the volumes, one needs a rendering plant and this can be for 5 ton/day, up to 300 ton/day of animal by-product.*
- What is the financial viability?
  - *Mavitec: currently, animal proteins are going from €350 per ton, and max to €900, per ton. Yes, this is for shore financially viable. N.B. also the oils and fats are at approx. €1.000,- per ton.*
- Which actors are needed (consortium)?
  - *Mavitec: to be determined.*
- What are the applicable laws and regulations?
  - *Mavitec: country specific.*



### 3) Vertical integration:

This option is more obvious and in which several delegates are interested (Bincx, Celtic Cooling, TransNational Agri, Angel Eggs and Chore Time). Although I Grow Chicken and AERES were not present, they also fit into this list of interested parties. Lionpro cannot be ruled out either. Transparency is key here. First, we have to look at how much money is available and only then determine what can be done within the limits of the available resources (time and money).

According to IPAS and CIMEL, 2 million EURO is still available for the further construction of a training centre in Diamniado. Combined with a RVO's subsidy and input from the consortium partners, there is potential to carry out a chain approach in which the following can be built (PPP):

- Small feed mill:
  - Feed counts for 70% of the cost. Research is needed on how to reduce this large cost. This is where Lionpro could contribute and show to what extent their animal and vegetable proteins are cost-effective. Another research question that could also be answered is, for example, which types of maize (or other input) have higher yields and can be produced locally.
  - Bincx can deliver de building (~€100/m<sup>2</sup>).
- Parent stock housing for broilers (perhaps later for layers too) + hatchery + broiler farm:
  - Import of Cobb and Ross
  - Angel Eggs has a lot of knowledge in this area. They already work closely with Wageningen Livestock Research (WUR, also a member of the DAPP) and the prominent poultry economist Peter van Horne.
  - Worthwhile to mention here is that the farm of Angel Eggs is situated in a Natura 2000 area. Due to ambiguities regarding government policy, the company is not considering investing further and standing still is not desirable. Perhaps such a project proves for the company that it is possible to set up a breeding farm in Senegal.
  - Chore Time could supply the material.
  - Bincx can deliver de building.
  - I Grow Chicken can deliver the Poultry Management Software.
- Slaughterhouse (1000 birds p/h):
  - TransNational Agri and Celtic Cooling could supply the material. TransNational Agri could also give trainings)
  - Bincx can deliver de buildings.
- Rendering plant (waste to be used for agricultural purposes)
  - Bincx can deliver de buildings.
  - Celtic Cooling could supply the cold material.
  - Mavitec

The next step is to invite all interested parties for a physical meeting to discuss the 3 follow-up ideas mentioned above and how each party can contribute to the implementation.

## 7. AFTERCARE

The following aftercare was carried out after the mission:

- Evaluations carried out with the mission participants (see Annex III).
- Article and Social Media posts on the mission published on NABC's channels.
- Mission pictures shared with all participants and co-organisers of the mission (see Annexes VI till X).
- All Senegalese contacts were shared with all participants and co-organisers of the mission.
- Final report and financial reporting.

Around 3 months after the mission (end of June 2023), the NABC will approach all the participants for another evaluation to review the results that were obtained. The results will be summarised in a one-page document and shared with the RVO and Agricultural Council. In addition, the NABC has offered its availability to delegates and Dutch companies who participated in the mission, to assist in facilitating follow-up contacts whenever needed.

# 8. FINANCIAL REPORT

The total budget for the Poultry Fact-Finding mission to Senegal was 32,231 EURO ex VAT (37,381 EUR inc VAT). The NABC is very grateful to the RVO for co-facilitating this fact-finding mission, financially and substantively. Our gratitude also goes to the Agricultural Council for Senegal and Côte d'Ivoire. Similarly, to the Netherlands Embassy in Dakar for all the substantial support/input and for sponsoring the networking reception in Dakar.

The table below presents the difference between the budget and actual costs. It shows a difference of -4,015 EURO ex VAT on the indirect costs and around 950 EURO on the direct costs. Regarding the former, many hours were spent on acquisition, promotion and persuading potential companies to join the mission. This activity was carried out twice by several employees within NABC. Unfortunately, the expected result did not materialise the first time (mission was scheduled for October 2022) but perseverance is the mother of success and the agreed number of 8 companies was later reached. It was also decided to travel earlier to Senegal to better prepare the mission on the ground and wait for the delegates to arrive. In terms of direct costs, the highest cost not taken into account in the budget was the meeting on the last day of the mission at Novotel. Nevertheless, the total budget for direct costs was not exceeded.

Table 3: budget justification

Budget Poultry Fact-Finding Mission Senegal							NABC	
Budget								
Description	Budget Poultry Fact-Finding Mission Senegal							
Sectors	Poultry							
Dates	13-17 March 2023							
Country	Senegal - Dakar and surroundings							
HOURS NABC			# OF PEOPLE	DAYS	RATE PER DAY	TOTAL	ACTUAL COSTS	REMAINING
<b>Preparation</b>								
Project coordination contact NABC, RVO, EKN, Agr Council		Senior	1,0	2,0	€ 850,00	€ 1.700,00	€ 1.700,00	€ -
Consultations Dutch companies		Senior	1,0	3,0	€ 850,00	€ 2.550,00	€ 2.550,00	€ -
Coordination hotel/food/logistics		Junior	1,0	2,0	€ 550,00	€ 1.100,00	€ -	€ 1.100,00
Program development, company visits		Senior	1,0	1,0	€ 850,00	€ 850,00	€ 2.550,00	€ -1.700,00
Logistics, book flights, hotel, letters		Junior	1,0	1,0	€ 550,00	€ 550,00	€ -	€ 550,00
Develop promotion material		Medior	1,0	1,0	€ 700,00	€ 700,00	€ 1.750,00	€ -1.050,00
Promotion newsletter, social media, website		Medior	1,0	1,0	€ 700,00	€ 700,00	€ 700,00	€ -
Mission preparation, registration, contact companies, online preparatory meeting		Senior	1,0	3,0	€ 850,00	€ 2.550,00	€ 4.250,00	€ -1.700,00
		Junior	1,0	3,0	€ 550,00	€ 1.650,00	€ 4.840,00	€ -3.190,00
Sub-total preparation (exc. VAT)						€ 12.350,00	€ 18.340,00	€ -5.990,00
Sub-total preparation (inc. VAT, total)	€	2.593,50				€ 14.943,50	€ 22.191,40	
Sub-total preparation (inc. VAT, actual)	€	3.851,40						
<b>Implementation</b>								
Preparation (in Senegal)		Senior	1,0	1,0	€ 850,00	€ 850,00	€ 3.400,00	€ -2.550,00
Mission coordination (in Senegal)		Senior	2,0	5,0	€ 850,00	€ 8.500,00	€ 4.250,00	€ 4.250,00
News outlet media: interview, article		Senior	1,0	0,5	€ 850,00	€ 425,00	€ -	€ 425,00
Sub-total implementation (exc. VAT)						€ 9.775,00	€ 7.650,00	€ 2.125,00
Sub-total implementation (inc. VAT, total)	€	2.052,75				€ 11.827,75	€ 11.900,00	
Sub-total implementation (inc. VAT, actual)	€	4.250,00						
<b>Evaluation and reporting</b>								
Evaluation, narrative report, financial report		Senior	1,0	2,0	€ 850,00	€ 1.700,00	€ 2.550,00	€ -850,00
Follow-up results and one-pager		Medior	1,0	1,0	€ 700,00	€ 700,00	€ -	€ 700,00
Sub-total evaluation and reporting (exc. VAT)						€ 2.400,00	€ 2.550,00	€ -150,00
Sub-total evaluation and reporting (inc. VAT, total)	€	504,00				€ 2.904,00	€ 3.085,50	
Sub-total evaluation and reporting (inc. VAT, actual)	€	535,50						
TOTAL HOURS NABC (exc. VAT)						€ 24.525,00	€ 28.540,00	€ -4.015,00
TOTAL HOURS NABC (inc. VAT, total)	€	5.150,25				€ 29.675,25	€ 37.176,90	
TOTAL HOURS NABC (inc. VAT, actual)	€	8.636,90						
<b>DIRECT COSTS</b>								
			Days	Unit	Number	Total	Total	Total remaining
Brochures + gifts minister and company visits				100	1	€ 200,00	€ 620,32	€ -420,32
Preparation costs (e.g. healthcare)	Senior			75	2	€ 150,00	€ 48,70	€ 101,30
Flight tickets + 1 extra luggage	Senior			1.000	2	€ 2.000,00	€ 1.287,27	€ 712,73
Private car rental or taxi (incl. airport pick-up & dropoff)	Senior		2,0	100	1	€ 200,00	€ 213,43	€ -13,43
Local costs	Senior (hotel, transport, food/drinks, other)		11,0	150	1	€ 1.650,00	€ 1.932,50	€ -282,50
Translation			5,0	200	1	€ 1.000,00	€ 1.000,00	€ -
Novotel Seminar 17th March (not budgeted)			1,0	1	1	€ 1.006,16	€ 1.006,16	€ -
Busrental (incl. gasoline+driver)			5,0	300	1	€ 1.500,00	€ 641,35	€ 858,65
TOTAL DIRECT COSTS						€ 7.706,16	€ 6.749,73	€ 956,43
TOTAL (HOURS AND DIRECT COSTS)						€ 32.231,16	€ 35.289,73	€ -3.058,57
VAT						€ 5.150,25	€ 8.636,90	€ -3.486,65
Total including VAT						€ 37.381,41	€ 43.926,63	€ -6.545,22

# 9. PROJECT COMPLETION MODEL

This project completion form provides a format to reflect on the project when the project is closed. The project completion report should reflect the opinion of both the implementing team and the beneficiaries. Netherlands Enterprise Agency (in Dutch: RVO.nl) will use the project completion report for evaluation and learning.

<b>RVO Project number</b>	PTM22SN01
<b>Project title</b>	Fact finding mission of Dutch companies to Senegal in the poultry sector
<b>Contractor</b>	The Netherlands-African Business Council (NABC)
<b>Budget</b>	31.425 euro excl VAT
<p><b>Project summary</b></p> <p>Reflection on the impact of the project, has the project been successful? What were success factors? What were the pitfalls? If relevant, how has the project affected the beneficiaries?</p>	<p>This project is a continuation of previous activities such as the <a href="#">poultry value chain analysis report</a> and the <a href="#">Senegal poultry group report</a>. The mission to Senegal took place from 13<sup>th</sup> to 17<sup>th</sup> March 2023 and was organised by the NABC in close cooperation with the Embassy of the Kingdom of the Netherlands in Dakar, the Netherlands Enterprise and Development Agency (RVO) and the Agricultural Council for Senegal and Côte d'Ivoire. The mission was originally scheduled for October 2022, however, postponed to 2023 because targeted participants had other priorities at the time. In response, more efforts and thus hours were put into acquisition and promotion. It paid off as 8 Dutch companies participated in the mission. It could have been 10 but two had to cancel last minute. The fact-finding mission proved to be a good momentum to re-energise Dutch and Senegalese relations and gave the delegates great insights into the Senegalese poultry value chain.</p>
<p><b>Project results</b></p> <p>Discuss each of the project results. Evaluate to what extent the envisioned results have been achieved. Discuss whether there have been any developments during the project runtime, that affected the project, for example elections, organizational changes. How did they affect the project and how have they been dealt with. Have there been any unexpected results? If any add a reflection here over.</p>	<ol style="list-style-type: none"> <li>1. <b>Opportunities for further cooperation should be proposed:</b> NABC submitted together with CIMEL and AERES a TMT proposal for training on business development and breeding. Further, a feasibility study on waste management and an impact cluster are also proposed.</li> <li>2. <b>Public and private partners in both countries that would be interested to engage in the above business cases and the enabling business environment will have been identified:</b> see pages 16 and 17 of this report.</li> <li>3. <b>How and with whom business cases can be realised:</b> see pages 16 and 17 of this report.</li> <li>4. <b>The roles of different stakeholders will be explained (the business cases should make use of Dutch poultry knowledge and technologies. Besides companies, how knowledge partners and public partners can support those projects):</b> see pages 16 and 17 of this report.</li> <li>5. <b>Training and capacity building needs will have been identified and ways to address those needs:</b> see pages 16 and 17 of this report.</li> <li>6. <b>Ways to mitigate risks will have been identified. What are the challenges and how they can be overcome:</b> <ol style="list-style-type: none"> <li>a. TMT call: obviously, we depend on whether our proposal is honoured or not. Further, it remains to be seen whether cooperation with CIMEL goes well. This project is a good test to see whether good cooperation holds up and whether the unexpected theme "parent stock breeding" is relevant enough as the Senegalese parties put forward during the mission. It did not come up before during the value chain study nor during the working group sessions.</li> <li>b. Feasibility study: first contact has been made with <a href="#">Mavitec</a>. For the company, it is too early to indicate whether a feasibility study is relevant for them. Several exchanges will be needed but they are open to advise when needed. Scheduling a physical meeting could make their contribution more concrete.</li> </ol> </li> </ol>

	<p>c. Impact Cluster: see pages 16 and 17 of this report. Furthermore, scheduling a physical meeting could make their contribution more concrete.</p> <p>7. <b>Increased knowledge of the Senegalese poultry sector by Dutch companies, including insight in relevant support mechanisms and facilities in both countries:</b> see Annex III. See pages 16 and 17 of this report.</p> <p>8. <b>Increased knowledge about solutions and the added value of the Dutch know-how and technology among Senegalese stakeholders, including insight in relevant support mechanisms and facilities in both countries:</b> see pages 16 and 17 of this report.</p>
<p><b>Deliverables</b></p> <p>What are the deliverables? Reflect on the differences compared to the deliverables requested in the ToR.</p>	<ol style="list-style-type: none"> <li>Mission preparation All agreed points have been implemented.</li> <li>Mission execution All agreed points have been implemented, except from egg processing because no delegate in this area participated in the mission.</li> <li>Report writing All agreed points have been implemented.</li> </ol>
<p><b>Indicators/KPI's</b></p> <p>Reflect on KPI's and add the actual numbers and add explanation. Also add additional positive or negative results if there are any.</p>	<p><u>PSD toolkit indicators given in the ToR were:</u></p> <ol style="list-style-type: none"> <li><b>PSD 1a: Number of parties formally starting a business collaboration and/or partnership (to be measured 3 months after the event). Distinguish between 1) Public 2) Private and 3) NGO. Within these categories, distinguish between A) Dutch and B) Local (non-Dutch):</b> for the moment, NABC, AERES and CIMEL have submitted a TMT proposal to Nuffic.</li> <li><b>PSD 7b: Number of people reached. Distinguish between 1) Dutch direct / indirect 2 and Local direct / indirect. And male / female:</b> 20-25 trainers of which at least 50% are women and/or young people.</li> <li><b>PSD 7c: Number of identified opportunities for investment and/or follow-up PSD projects including qualitative descriptions:</b> a feasibility study regarding waste management</li> <li><b>PSD 7d: A new PSD project initiated, minimum 1:</b> an impact cluster.</li> </ol>
<p><b>Activities</b></p> <p>Go over the project activities. What activities were considered most/least useful? Did the activities logically lead to the envisioned results and the aspired purpose? What lessons can be learnt regarding the work plan and the project organisation?</p>	<p>See Annex II: Programme Senegal Poultry Mission 2023_FINAL</p> <p>The programme was clear and served the mission goals. The field visits and business cocktail (although on the short side) were particularly appreciated. Unfortunately, it was not possible to visit the FIARA fair due to some political unrest around the capital. This was seen as a missed opportunity by the delegation, but they understood that safety comes first.</p>
<p><b>Local partner(s)</b></p> <p>Reflection on cooperation with the local partner. What are lessons learnt?</p>	<p>Cooperation with the EKN in Daker was excellent. They managed to meet the delegation's expectation. Also, the local organisations like IPAS, FAFA, CIMEL provided sound inputs.</p> <p>Only one key thing that was missing was the translation from the Senegalese members of working group into concrete action points. They lingered too long on the challenges they are currently experiencing while these were already identified during the sessions.</p>
<p><b>Cooperation between implementing team and beneficiaries</b></p> <p>Evaluate the cooperation between the implementing team, beneficiary and counterpart.</p> <p>Did all parties have the same expectations with regard to the project? Was everyone committed to the project? Did any problems occur while organising activities and making appointments? Was it easy to communicate per e-mail/phone/letter and in person? Did all parties have enough human resources available?</p>	<p>Cooperation with the different parties went smoothly. It was very intense as the mission period approached but given the result, it was worth it.</p>
<p><b>Reflection on (Dutch) economic interests</b></p>	<p>This was a fact-finding mission and not a trade mission. Nevertheless, a number of companies were able to secure relevant contacts during this mission, including Bincx and Lionpro. Marel Poultry and Marel Water Treatment were already doing</p>

<p>If relevant, discuss how and to what extent the project has improved the conditions for bilateral trade and investment relations and/or for bilateral public relations.</p>	<p>business with SEDIMA and the latter enjoyed meeting this major customer again. The Q&amp;A responsible at SEDIMA's water treatment department was very happy to meet Marel Water Treatment in real life. They appeared to have been experiencing problems for weeks but could not reach the right person within Marel Water Treatment.</p> <p>The mission also marked the first time the Minister of Livestock and Animal Production and the Dutch Ambassador to Dakar met each other.</p>
<p><b>Opportunities for follow up and recommendations</b></p> <p>Discuss the actions that have been undertaken or should be undertaken in order to assure the sustainability of the project. What will happen with the results?</p>	<p>It is important to give continuity to this project. This will be done if the TMT proposal is honoured. In addition, all delegates + Mavitec should be invited to discuss the next steps. The RVO and the EKN in Dakar can inform what instruments are available and how they can facilitate, whereby the Dutch companies can indicate whether it is interesting for them, what their ideas are and how they can/will contribute to the continuity of this project.</p>
<p><b>Communication</b></p> <p>What has been communicated and what should still be communicated according to the original assignment and/or to your opinion? Indicate the means of communication that was used, think here of reports, journal articles, social media etc</p>	<ol style="list-style-type: none"> <li>1. Flyer to promote the mission</li> <li>2. Announcement of the mission on the <a href="#">NABC website</a></li> <li>3. Annex I: Senegal_2023_Mission Brochure_FINAL</li> <li>4. <a href="#">Agroberichtenbuiteland.nl</a></li> <li>5. <a href="#">RVO publication mission on website</a></li> <li>6. <a href="#">NABC post on LinkedIn 1</a></li> <li>7. <a href="#">NABC post on LinkedIn 2</a></li> <li>8. <a href="#">NABC post on LinkedIn 3</a></li> <li>9. <a href="#">NABC post on LinkedIn 4</a></li> <li>10. <a href="#">NABC post on LinkedIn 5</a></li> </ol>
<p><b>Reflection on the cooperation with RVO and the Embassy</b></p> <p>What went well? Is there something that should have been done differently?</p>	<p>The cooperation with the RVO and the EKN in Dakar was experienced as very pleasant. All the necessary support was given so that all parties, including the delegation, were satisfied with the course of events.</p>

# 10. ANNEXES

All attachments are sent as separate documents.

Annex I: Senegal\_2023\_Mission Brochure\_FINAL

Annex II: Programme Senegal Poultry Mission 2023\_FINAL

Annex III: Mission Evaluation Form Delegates

Annex IV: Presence's List - Visit to the Ministry of Livestock and Animal Production

Annex V: List of Invitees to the Business Cocktail

Annex VI: Pictures 13 March

Annex VII: Pictures 14 March

Annex VIII: Pictures 15 March

Annex IX: Pictures 16 March

Annex X: Pictures 17 March

Annex XI: NABC's Presentation at the Ministry of Livestock and Animal Production

Annex XII: NABC's Presentation at IPAS/FAFA

Annex XIII: NABC's Presentation during Mission Closure

Annex XIV: Practical Information Guide