



Transforming Nigeria's Livestock Sector

Evidence and Policy Priorities for Sustainable Food Systems

Georgina Njiraini, Philemon Chelang'a, Adho Yattani, Olufemi Popoola, and Oliver K. Kirui

EXECUTIVE SUMMARY

Nigeria has the largest livestock population in West Africa and the fourth-largest cattle herd in Africa, yet the sector remains, in the words of long-standing diagnoses, a “sleeping giant” (Jega 2025). The livestock sector contributes approximately USD 32 billion, or 5 percent of national GDP, and around 17 percent of agricultural GDP. The livelihoods of 30 million people are directly supported by livestock, including those of over 15 million pastoralists. Roughly 40 percent of the protein consumed by Nigerians is sourced from animals.

Nonetheless, the sector is underperforming structurally. In 2023, it grew by just 1.9 percent, less than one-third of the 6 percent agricultural sector growth target under the Comprehensive Africa Agriculture Development Programme. Average dairy yields are low at about 1.0 liters per cow per day against an achievable 10 liters. No commercial-scale cattle processing facilities exist. The livestock feed industry remains underequipped—feed imports consumed USD 50 million in 2025. Livestock disease outbreaks remain common—131 contagious bovine pleuropneumonia outbreaks were recorded in 2025. By 2050, meeting domestic demand for livestock products will require increases in poultry production of 250 percent above current production levels, 115 percent in beef, and 575 percent in milk.

The binding constraints to accelerated growth in Nigeria’s livestock sector are feed systems failure, an endemic and underreported animal disease burden, structural herder–farmer conflict, low genetic potential, the near-absence of processing and cold chain infrastructure, and intensifying climate risk. These interact as reinforcing cycles rather than isolated problems. In this paper that has been prepared to inform the development of a strategic action plan for Nigeria’s livestock sector, we examine the prospects for removing these barriers in order to put the sector on a pathway of sustained growth.

Fortunately, the policy architecture for livestock sector development in Nigeria is now the strongest in the sector’s history. The Federal Ministry of Livestock Development, created in July 2024, anchors the Nigeria Livestock Growth Acceleration Strategy for 2025 to 2035, the first-ever Nigeria Livestock Master Plan, and the Livestock Productivity and Resilience Support investment program. Major financing is being mobilized, including a USD 2.5 billion commitment to invest in livestock processing from JBS S.A., a Brazilian meat processing company, the creation of the Africa Pastoral Markets Development platform with a USD 3 billion private-investment target, and the Special Agro-Industrial Processing Zones project. Early progress under these initiatives is visible—by mid-2026, the Ministry had vaccinated 6.2 million livestock in a nationwide anthrax campaign, profiled over 600,000 livestock farmers using electronic tools, validated a National Dairy Policy Implementation Framework, and approved a veterinary reform roadmap to run through 2036.

The principal conclusion we draw from this study is that Nigeria’s livestock sector development challenges are primarily linked to ineffectual implementation rather than poor policy design. The Nigeria Livestock Growth Acceleration Strategy should therefore prioritize implementation architecture—binding federal–state compacts on livestock development actions, foundational data systems that include a completed baseline on Nigeria’s livestock resources and a National Livestock Identification and Traceability System, feed systems development, animal health recapitalization, and putting in place the mechanisms that will convert committed private capital into operational investments in Nigeria’s livestock sector.

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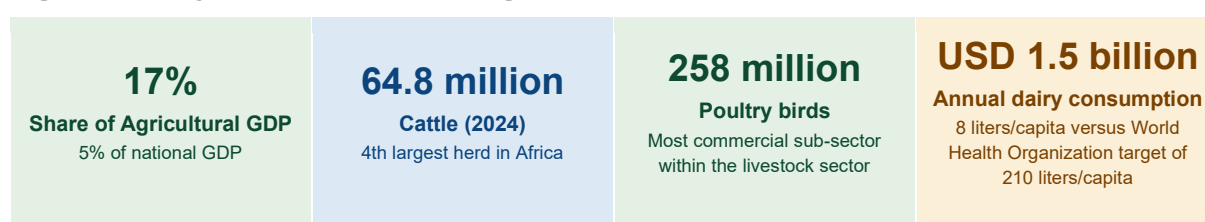
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1. INTRODUCTION AND CONTEXT

Nigeria's livestock sector is a central pillar of the national agrifood system with far-reaching roles in economic output, livelihoods, food security, and nutrition (Figure 1-1). The National Livestock Growth Acceleration Strategy targets a doubling of livestock GDP (gross domestic product) from USD 32 billion to at least USD 74 billion under a base-case scenario or USD 91 billion under a high-performance scenario by 2035. Livestock is expected to make a significant contribution to achieving Nigeria's ambition of a USD 1 trillion economy (AgroNigeria 2026). Beyond aggregate figures, the sector is deeply embedded in rural and peri-urban economies, serving as a key source of income, employment, and economic resilience for smallholder farmers, pastoralists, and micro-enterprises.

Figure 1-1 Key characteristics of Nigeria's livestock sector



Source: Authors' compilation based on USDA–FAS (2025b, 2026), FAOSTAT (2024), and NBS (2024)

Demand for livestock products is rising rapidly. Nigeria's population, now exceeding 220 million and projected to reach approximately 400 million by 2050, is urbanizing and shifting consumption toward higher-value, protein-rich foods (NPC 2021, UN DESA 2022). This presents a clear opportunity for domestic livestock producers to expand production, improve market participation, and reduce import reliance. The opportunity is matched by mounting pressures stemming from persistent structural constraints in productivity, input systems, finance, and postharvest management, compounded by climate variability, environmental degradation, and resource-use conflict (FMLD, L-PRES, and ILRI 2026b, World Bank 2024a).

The Kampala Declaration (2026–2035) under the Comprehensive Africa Agriculture Development Programme (CAADP) marks a paradigm shift from agriculture-led growth to a comprehensive agrifood systems approach that integrates production, nutrition, trade, climate resilience, and governance, and explicitly prioritizes livestock within integrated food systems (African Union and AUDA-NEPAD 2025). For Nigeria, this means the livestock sector can no longer be planned and budgeted as a peripheral agricultural sub-sector.

This working paper provides an integrated, single-sector reference for the process of creating a strategic action plan for Nigeria's livestock sector. This review covers sector performance, constraints to and opportunities for growth in the sector, the policy and institutional landscape, investment and scaling pathways, and specific integrated inputs for the strategic action plan.

Two features distinguish the present moment. The first is institutional. The creation by the Federal Government of Nigeria of a dedicated livestock ministry in July 2024 ended decades in which livestock was managed as an appendage of crop agriculture. Since its formation, the Ministry has moved quickly to assemble a National Livestock Growth Acceleration Strategy (NL-GAS), the Nigeria Livestock Master Plan (NLMP), a donor coordination

platform, and a sequence of dairy, animal-health, and traceability frameworks (FMLD 2025a, Natsa 2025).

The second is commercial. Large-scale private capital, long absent from the sector, is now actively seeking entry. These initiatives range from the commitment by the large Brazilian meat processing company, JBS S.A., to engage in livestock processing, to a private-sector-led investment initiative valued at around USD 50 billion unveiled in 2026, and bilateral engagements with Brazilian, Danish, Belgian, and Swiss partners (Ecofin Agency 2026, FMLD 2025a). Whether these financial commitments result in commercial operations depends on many of the fundamentals of implementation that this paper examines. In the sections that follow, we provide a diagnosis of sector performance, the constraints that suppress it, the policy and institutional landscape for livestock sector development, investment and scaling pathways for the sector, and the specific inputs required for the strategic action plan for Nigeria's livestock sector.

This national agenda for livestock development sits within a powerful global trend. The Food and Agriculture Organization of the United Nations (FAO) projects that global meat consumption will rise by roughly 73 percent by 2050, with demand growth concentrated in low- and middle-income countries. The FAO estimates that terrestrial animal-source foods already underpin the livelihoods and food security of approximately 1.3 billion people, including some 930 million in Africa and South Asia (FAO 2011, FAO 2023, Van Eenennaam 2024). Sub-Saharan Africa is the epicenter of this projected expansion—demand for poultry in the region is forecast to rise by over 200 percent by 2050. However, the region produces only about 2.8 percent of the world's meat and milk, while holding more than 14 percent of global livestock resources (Erdaw 2023). This gap between resource endowment and output is precisely the 'sleeping giant' problem of Nigeria's livestock sector. It positions a transformed Nigerian livestock sector not only to meet domestic demand but to supply fast-growing regional markets under the African Continental Free Trade Area (AfCFTA).

2. SECTOR PERFORMANCE AND BENCHMARKS

This section diagnoses how Nigeria's livestock sector actually performs, building on the context described in the previous section. It examines the macroeconomic role of livestock, the profiles of the major livestock sub-sectors, livestock productivity benchmarked against regional and global comparators, and the demand-supply trajectory for livestock products to 2050 that makes the case for transformation unavoidable.

2.1 Macroeconomic role

Nigeria holds the fourth-largest cattle population in Africa and the largest livestock population in West Africa, estimated in 2024 at approximately 65 million cattle, 88 million goats, 49 million sheep, 258 million poultry, and 9 million pigs (FAOSTAT 2024). The sector is valued at approximately N30 trillion (Ogunyemi 2025). However, it is characterized by a fundamental structural tension: Nigeria has the population base, natural-resource endowment, and market demand to be a dominant regional livestock economy, yet the sector has underperformed for decades. In 1970, Beck (1970) described Nigeria's cattle industry as a "sleeping giant", and a half-century later the diagnosis remains accurate (Jega 2025, Ocheja et al. 2025).

2.2 Livestock sub-sector profiles

Cattle (beef and dairy). Nigeria's cattle herd is dominated by Zebu-type indigenous breeds, such as White Fulani, Red Bororo, and Sokoto Gudali, that are predominantly managed in extensive pastoral and agropastoral systems. Approximately 99 percent of cattle are kept in smallholder and pastoral systems (Kimani 2022). In 2023, the industry produced approximately 361,000 metric tons (mt) of beef, 585,000 mt of milk (processed-equivalent terms), and hides and skins (FAOSTAT 2024, FMLD, L-PRES, and ILRI 2026b, PLRIC 2025). Critically, there are no operational commercial-scale cattle meat processing facilities in Nigeria. In consequence, cattle frequently enter markets in stressed conditions due to logistical and transport challenges, causing weight loss and quality degradation before slaughter (FMLD, L-PRES, and ILRI 2026b, PLRIC 2025).

Poultry. The poultry sub-sector of both broilers and layers is the most commercially developed sub-sector in Nigeria's livestock sector. Commercial poultry operations are concentrated in Lagos, Ogun, Oyo, and Plateau states (FAOSTAT 2024, USDA-FAS 2025a). Domestic poultry production was approximately 256,000 mt in 2023 and is projected to grow only modestly to 269,000 mt by 2028, far below demand growth (FMLD, L-PRES, and ILRI 2026b). The poultry sub-sector has been severely affected by high feed costs and the depreciation of the Nigerian Naira, with egg prices rising 128 percent year-on-year in 2024 (NBS 2024).

Small ruminants (goats and sheep). Nigeria has the largest goat population in Africa with approximately 88 million. Goats serve primarily as flexible financial reserves and socio-cultural assets. Goat meat is the third most consumed meat after beef and chicken and commands premium prices. Sheep, with a national herd of around 49 million, are predominantly managed in the northern zones (FAOSTAT 2024). Both species are vulnerable to Peste des Petits Ruminants (PPR), which is endemic nationwide (FMARD 2017, Esonu et al. 2022).

Dairy products. Domestic milk production, primarily from pastoralist-managed Fulani cattle, is estimated at 585,000 mt per year and is marketed and consumed predominantly in a raw and unprocessed form. Nigeria imports almost USD 300 million worth of dairy products annually (USDA-FAS 2025b). Average per capita milk consumption is just 8 liters per year against the World Health Organization recommendation of 210 liters, reflecting both production constraints and possible distribution failures. The opportunity in the dairy sub-sector for import substitution is among the highest across all livestock sub-sectors.

Dairy has accordingly become an early focus of the reform agenda for the livestock sector. In November 2025, the Ministry validated a National Dairy Policy Implementation Framework (Imohimi 2026). A sequence of investment vehicles has followed, including a partnership with the New Nigeria Development Company to develop dairy clusters across the northern states and a memorandum of understanding between the Nigeria Sovereign Investment Authority and Asset Green of the United Kingdom for an integrated enterprise valued at USD 496 million comprising of a 10,000-milking-cow operation, fodder production, and a processing plant for fresh milk, butter, cream, milk powder, and infant formula, projected to generate around 2,500 direct and over 5,000 indirect jobs (Imohimi 2026, FMLD 2025a). These commitments signal growing investor confidence in Nigeria's livestock sector, but their realization depends on the same feed, genetics, and cold chain fundamentals that have posed significant constraints on sectoral growth in the past.

2.3 Productivity benchmarks

Nigeria's livestock productivity sits well below regional and global comparators across every major indicator, as benchmarked against the 2035 targets for the Nigeria Livestock Master Plan (Table 2-1). The gap rating reflects a qualitative assessment combining three criteria: the magnitude of the gap between Nigeria's current value and the benchmark, the indicator's foundational importance (the extent to which progress on other indicators depends on it), and the difficulty of reversing the gap. A rating of "Critical" indicates that Nigeria's current value is below roughly 40 percent of the benchmark, or a gap exceeding about 60 percent, and that the performance on the indicator is a binding constraint on gains elsewhere in the sector. A rating of "High" indicates a substantial gap of roughly 30 to 60 percent of the benchmark. Performance on indicators with a High gap rating is viewed as still somewhat enabling. A gap rating of "Medium" indicates performance levels roughly 30 percent below benchmarks and generally applies to livestock sector indicators that already are on an improving trajectory. The thresholds are approximate. Moreover, if the underlying data is uncertain, the rating reflects a more conservative reading.

Table 2-1 Livestock productivity benchmarks against regional and global comparators

Indicator	Nigeria (current)	Regional or global benchmarks	Nigeria Livestock Master Plan 2035 target	Gap
Milk yield per dairy cow	~1 liter/day	Ethiopia 3–5 liter/day, Kenya 8–12 liter/day, India 6–10 liter/day	10 liter/day	Critical
Cattle herd offtake rate	~2.5% per year	East Africa 8–10%, global commercial 15–25%	Double by 2030	Critical
Poultry feed conversion ratio (kg feed per kg poultry)	2.8–3.2	Global best practice: 1.6–1.8	Reduce to 2.0	High
Beef production, national	361,000 mt (2023)	Demand ~500,000 mt, growing 3 to 4 percent per year	Increase by 35% by 2030	Medium
Livestock sector growth rate	1.88%/yr (2023)	CAADP target: 6%/yr	Sustain growth at or above 5% per year	High
Value addition rate	<10% of output	Brazil and Thailand achieve 60 to 80%	Greater than 40% by 2033	Critical
Veterinary service coverage	<30% of herds are reached	Southern African Development Community (SADC) reaches more than 60% of herds; East African Community reaches more than 50%	More than 60% of herds by 2029 (L-PRES)	Medium
Postharvest meat losses	25 to 40% wastage	Well-functioning markets have losses of less than 5%	Less than 15% by 2033	Critical
Dairy self-sufficiency ratio	~30%	Kenya >90%, Ethiopia ~85%	More than 50% by 2030	Critical

Source: PLRIC (2025), FMLD, L-PRES, and ILRI (2026a, 2026b), FAOSTAT (2024), World Bank (2024a).

Note: CAADP=Comprehensive Africa Agriculture Development Programme

2.4 Demand-supply gap projections to 2050

The Presidential Livestock Reforms Implementation Committee projections are unambiguous about the scale of transformation required. By 2050, Nigeria's population is projected to reach approximately 400 million, generating demand increases above current production levels of about 250 percent for poultry meat, 115 percent for beef, and 575 percent for milk (PLRIC 2025, NPC 2021, UN DESA 2022). Under a business-as-usual scenario, without targeted investment in productivity, processing, and market development, demand will outpace domestic supply growth, progressively deepening Nigeria's dependence on imports of livestock products. The direction of this trajectory is already observable in the dairy import bill of almost USD 300 million and growing feed import dependency, estimated at USD 50 million in 2025 (USDA-FAS 2025b, 2026).

3. KEY CONSTRAINTS

The current performance gaps seen in Nigeria's livestock sector are not accidental, but are the visible symptoms of a set of binding constraints. Six such constraints suppress livestock-sector performance. They are not independent, as each amplifies the others. Together they form a set of reinforcing cycles that require systemic rather than single-point responses. Each is presented below with its severity rating of either "Critical" or "High". A deeper analysis of their root causes and the ways in which these constraints interact is developed in Section 7.

CRITICAL CONSTRAINTS

1. Feed systems failure [Critical]

Nigeria imported USD 50 million in feed and feed-related products in 2025. In commercial livestock production operations in Nigeria, feed costs represent 60 to 70 percent of total production costs. The poultry sub-sector, despite being commercially the most developed, has been severely affected by high feed costs and weakened consumer purchasing power. Egg prices rose almost 130 percent in 2024 year-on-year. No large-scale domestic feed manufacturing hubs exist, and grain aggregation infrastructure to supply feed mills is underdeveloped in all ecological zones.

This feed constraint interacts with every other challenge facing Nigeria's livestock sector: Poor nutrition reduces vaccine efficacy, suppresses genetic expression, and limits growth rates even in improved breeds. Inadequate feed also fuels herder-farmer conflict as pastoralists migrate southward into zones dominated by crop agriculture as they search for pasture to feed their herds (USDA-FAS 2026, NBS 2024, FMLD, L-PRES, and ILRI 2026a, Kimani 2022).

2. Animal disease burden—endemic, underreported, and operationally uncontrolled [Critical]

The government recorded in 2025 131 outbreaks of Contagious Bovine Pleuropneumonia (CBPP) that affected 17 states across all six geopolitical zones. In Taraba State alone, CBPP affected 3,500 cattle in 2024, with 700 deaths and 138 animals culled to contain the spread of the disease. The World Organization for Animal Health estimates CBPP mortality can reach 50 percent in affected herds. Foot-and-mouth disease, anthrax, Newcastle disease, Peste des Petits Ruminants, brucellosis, and trypanosomiasis are also endemic in Nigeria's livestock. Animal health surveillance systems significantly underreport the true burden of these diseases. The National Veterinary Research Institute vaccine production capacity is below national need, and vaccine delivery systems for pastoral and remote communities are virtually non-existent. The absence of a national livestock identification and traceability system means that outbreaks cannot be linked to herd histories, making contact tracing and response ineffective (Al-Mustapha et al. 2025, FBMEA 2026, WOAH 2026).

HIGH CONSTRAINTS

3. Herder-farmer conflict—structural, economically destructive, and intensifying [High]

Farmer-herder conflict directly reduces the quantity of animal-source food consumed by Nigerian households and increases the number of days they exclude protein from their diets (Fadare, Srinivasan and Zanello 2024). Over 15 million pastoralists manage 82 percent of Nigeria's cattle in mobile systems. Variable rainfall, increasing desertification in northern Nigeria and in the Sahelian countries to the North, and loss of grazing reserves push herders south into the Middle Belt of the country, intensifying competition for land and water. Conflict between farmers and herders restricts veterinary access for the herders' cattle, disrupts markets, reduces investment in herd improvement, raises zoonotic transmission risk, and deters private investment.

The Presidential Livestock Reforms Implementation Committee frames the Nigeria Livestock Master Plan explicitly as a peace-building instrument. With this aim in mind, it has proposed formalizing pastoral corridors across six northern states as an immediate structural intervention to reduce the incidence of herder-farmer conflict (Fadare, Srinivasan and Zanello 2024, PLRIC 2025, ILRI 2023, Majekodunmi 2022)

4. Low genetic potential—indigenous breeds underperforming achievable productivity [High]

The average Nigerian dairy cow produces approximately one liter of milk per day against an achievable 10 liters with improved genetics, feeding, and health management. Dual-purpose breeds adapted to Nigeria's tropical climate with both productive performance and heat tolerance remain largely unavailable at commercial scale. Improved poultry breeds, such as FUNAAB Alpha and NAPRI Shika Brown, have been developed but reach only a small fraction of producers. The absence of a national nucleus breeding program, artificial insemination network, or functioning gene bank means genetic improvement at herd level is effectively inaccessible for most producers, compounding the feed and health constraints (PLRIC 2025, FAOSTAT 2024, FMLD, L-PRES, and ILRI 2026a)

5. Absence of processing and cold chain infrastructure [High]

No operational commercial-scale cattle meat processing facilities exist in Nigeria as of 2025. The memorandum of understanding signed in November 2024 with JBS S.A., the large Brazilian meat processing company, for six livestock processing plants valued at USD 2.5 billion—three for poultry, two for beef, and one for pork—is transformative in ambition but is not yet operational. Without processing infrastructure, Nigeria’s value-addition ratio stays below 10 percent. In contrast, Brazil and Thailand achieve 60 to 80 percent value addition in their livestock sectors. Livestock enter markets in stressed condition, so fetch lower prices. With lower-value animals, Nigeria’s export earnings from livestock products are significantly lower than their potential. In addition, post-slaughter meat losses of 25 to 40 percent occur in processing, storage, and retail, representing real losses to Nigeria’s food supply and to the income of its citizens who raise livestock (PLRIC 2025, FMLD, L-PRES, and ILRI 2026a, USDA–FAS 2025a, FBMEA 2026).

6. Climate change—accelerating pastoral vulnerability and system fragility [High]

Prolonged drought in northern Nigeria reduces pasture availability and water access. Nigeria loses approximately 351,000 hectares of arable land to desert annually in the north. Flooding in central and southern zones disrupts livestock movement and damages fodder crops. Pastoralists face a documented ‘triple burden’ of disease outbreaks, conflict, and climate change. No index-based livestock insurance system linked to satellite pasture or weather data exists at operational scale in the country. Nigeria’s nationally determined contribution (NDC) to cut greenhouse gas emissions and adapt to climate change impacts commits the country to livestock methane reduction and climate-smart pasture management. However, progress on these contributions is weak as climate finance pipelines for the sector remain inactive (Majekodunmi 2022, FMEnv 2021, FGN 2022, NDC Partnership 2025).

These six constraints are not beyond the reach of policy. Several are specified and increasingly acted upon within Nigeria’s rapidly evolving governance architecture for the development of its livestock sector. The following section assesses that policy and institutional landscape, discussing both the instruments now in place to address the constraints and the coordination gaps that continue to limit delivery.

4. POLICY AND INSTITUTIONAL LANDSCAPE

The institutional landscape has undergone significant structural change since 2023. The creation of the Federal Ministry of Livestock Development (FMLD) in July 2024 reshaped the governance architecture for the sector, creating both new opportunities for focused investment and new risks of coordination gaps (FMLD 2024, PLRIC 2025). Highest-level oversight for action to develop Nigeria's livestock sector rests with the Presidential Livestock Reforms Implementation Committee (PLRIC), chaired by the President. The sector is supported by a multi-tier architecture spanning:

- Federal ministries, federal agencies, and parastatals, including the National Animal Production Research Institute, National Veterinary Research Institute, and the Federal Department of Veterinary and Pest Control Services;
- State-level bodies, including state ministries, the Agricultural Development Projects (agricultural extension services), and the state veterinary services;
- Development partners, including the World Bank-funded Livestock Productivity and Resilience Support Project (L-PRES), the International Livestock Research Institute, the African Development Bank, and the African Union–Inter-African Bureau for Animal Resources; and
- Non-state actors, including the All Farmers Association Nigeria (AFAN), the Nigerian Veterinary Medical Association, and the Miyetti Allah Cattle Breeders Association of Nigeria.

4.1 Livestock policy Instruments

Table 4-1 lists the principal policy instruments now guiding the development of Nigeria's livestock sector or specific sub-sectors.

Table 4-1 Overarching policy instruments for the livestock sector in Nigeria

Policy / Program	Period	Lead	Status
National Livestock Transformation Plan (NLTP)	2019–2028	• Federal Ministry of Agriculture and Food Security (FMAFS) • Federal Ministry of Livestock Development • States	Partially achieved
National Livestock Growth Acceleration Strategy (NL-GAS)	2025–2035	• Federal Ministry of Livestock Development	Early stage
Nigeria Livestock Master Plan (NLMP)	2025–2030	• Federal Ministry of Livestock Development • International Livestock Research Institute • Livestock Productivity and Resilience Support Project (L-PRES)	Under development
Livestock Productivity and Resilience Support Project (L-PRES)	2020–2028	• Federal Ministry of Agriculture and Food Security • World Bank	Active
National Animal Feeds and Fodder Policy	2024 +	• Federal Ministry of Livestock Development	Early stage
Agriculture Promotion Policy (APP)	2016–2020	• Federal Ministry of Agriculture and Rural Development (now FMAFS)	Completed
National Agricultural Technology and Innovation Policy (NATIP)	2022–2027	• Federal Ministry of Agriculture and Food Security	Active

Source: Authors' compilation based on NEC (2019), FMLD (2025a), FMAFS (2022), World Bank (2024a), FMFBNP (2021)

4.1.1 National Livestock Transformation Plan, 2019–2028

Launched in 2019 following a surge in farmer-herder violence, the National Livestock Transformation Plan (NLTP) aims to modernize livestock production in Nigeria by transitioning from extensive open grazing to more intensive settled ranching, while reducing conflict and improving productivity (NEC 2019). It envisaged 119 operational ranches by 2028 that directly or indirectly provide over 2 million jobs. The central lessons learned from challenges to past efforts to modernize livestock production in Nigeria, including insufficient grassroots consultation, weak land governance, and the importance of secure and adequate funding streams, directly inform the design of the livestock transformation plan.

However, implementation of NLTP has stalled. No ranch was operational as of 2022, adoption of intensive livestock production systems has been minimal amid widespread herder and farmer distrust, and the proposed federal-state funding compact to finance the plan, which proposed having the federal government cover 80 percent of the plan's costs, has never been put in place. Government agencies have, however, resuscitated over 400 grazing reserves and established 11 transboundary disease control posts (Farm Alert 2026, PLRIC 2025).

4.1.2 National Livestock Growth Acceleration Strategy, 2025–2035

The National Livestock Growth Acceleration Strategy (NL-GAS), the flagship strategy of the Federal Ministry of Livestock Development, was approved by the National Economic Council and is structured around 10 strategic pillars (USDA–FAS 2026, Natsa 2025):

- Animal value chain development and market access,
- Animal health and zoonoses control,
- Feed and fodder development,
- Water resources management,
- Finance and investment,
- Peacebuilding and social cohesion,
- Infrastructure development,
- Livestock extension services,
- Women, youth, and inclusion, and
- Data systems and research.

NL-GAS is explicitly market-oriented and private-sector-led. Its principal goal is to double the national herd size and output from Nigeria's livestock sector by 2035.

Early achievements under NL-GAS include the establishment of the Livestock Sector Donor Working Group (October 2025), validation of the National Animal Feeds and Fodder Policy, initiation of the National Livestock Baseline Study (May 2026), and investment discussions with JBS S.A., the large Brazilian meat processing company (FMLD 2025b, 2026, Ailemen 2026). The principal gap in the strategy is the absence of a publicly available detailed implementation plan with granular activity sequencing, budgets, and accountability frameworks.

4.1.3 Nigeria Livestock Master Plan, 2025–2030

The Nigeria Livestock Master Plan (NLMP) is Nigeria's first-ever comprehensive livestock master plan, providing five-year, value chain-specific investment roadmaps for cattle, small ruminants, poultry, and dairy. The plan was developed over 24 months by the International Livestock Research Institute under the Livestock Productivity and Resilience Support (L-PRES) Project (FMLD, L-PRES, and ILRI 2026a). The Livestock Sector Analysis and Strategy were delivered to the Federal Ministry of Livestock Development in October 2025, with the Presidential Livestock Reforms Implementation Committee confirming the alignment of the Master Plan with national livestock sector reforms. The full investment roadmaps and financing framework are not yet publicly released. Tanzania's equivalent International Livestock Research Institute -supported Master Plan mobilized over USD 624 million in investment, indicating the NLMP's potential as a bankable framework (ILRI 2023).

4.1.4 Livestock Productivity and Resilience Support Project, 2020–2028

The Livestock Productivity and Resilience Support (L-PRES) project is Nigeria's largest single livestock investment, providing USD 500 million over six years across four components: strengthening national institutions, strengthening selected value chains, enhancing community resilience, and project coordination (World Bank 2022, 2024a). It operates in 18 states through subsidiary loan agreements that are overseen by State Coordination Offices. L-PRES support has been used to create a network of active artificial insemination programs, with some states reporting conception rates above 79 percent, over 50 milk collection centers, pasture development initiatives, and a private veterinary practice support program. The principal constraint to the accelerated implementation of the project has been the slow rollout of a credit line for project activities from the Development Bank of Nigeria. This funding source is not yet reaching small livestock producers at scale.

4.2 Institutional architecture and coordination

The livestock sector is governed by a multi-tier institutional architecture. At the top tier, the Federal Ministry of Livestock Development holds primary policy, strategy, and investment responsibility through its 17 departments. In parallel, the Federal Ministry of Agriculture and Food Security retains its role as the Comprehensive Africa Agriculture Development Programme (CAADP) focal point for Nigeria and convenes Joint Sector Reviews within Nigeria's agrifood sector. The Federal Ministry of Finance controls the agriculture budget envelope and is responsible for leading the effort in Nigeria to attain the 10 percent target under CAADP for the share of the annual public budget devoted to agriculture (FMLD 2024, PLRIC 2025).

In the second tier of the institutional architecture are the technical agencies involved in livestock production. These include the National Animal Production Research Institute (NAPRI) at Shika/Zaria for production, nutrition, breeding, and genetics research, the National Veterinary Research Institute (NVRI) at Vom for vaccine production and disease surveillance, the Federal Department of Veterinary and Pest Control Services for quarantine and export certification, and the Development Bank of Nigeria for credit lines to support livestock sector development.

The third tier is made up of state-level agencies that are responsible for delivering technical services to livestock producers. These include the state ministries for agriculture and for

livestock, the Agricultural Development Programmes providing state-level agricultural extension services, and the state Departments of Veterinary Services form the Tier 3 delivery layer.

However, there are three recurrent coordination gaps that are material to the effective implementation of any strategic action plans for the development of Nigeria's livestock sector:

- **Inter-ministerial fragmentation.** The creation of the Federal Ministry of Livestock Development was a structural improvement. However, its creation introduced new coordination challenges with the Federal Ministry of Agriculture and Food Security. This challenge is illustrated in the National Livestock Transformation Plan being first transferred from the Office of the Vice President to the Federal Ministry of Agriculture and Food Security and then, in April 2025, to the Federal Ministry of Livestock Development, a pattern of serial institutional instability (FMLD 2024, PLRIC 2025). Establishing a standing livestock–fisheries–agriculture coordination mechanism at the Permanent Secretary level and confirming the Federal Ministry of Livestock Development as a Joint Agricultural Sector Review co-convenor with the Federal Ministry of Agriculture would be important steps to strengthen the coordination of strategic action plan implementation for livestock sector development nationwide.
- **Federal-state coordination failure.** Most delivery of livestock-related public services occurs at the state level. However, resource-transfer and accountability mechanisms are chronically weak in the states. The financing proposal under the National Livestock Transformation Plan for the federal government to be responsible for 80 percent of the costs of implementing the plan and the states responsible for 20 percent collapsed precisely here. A similar pattern is seen with the Livestock Productivity and Resilience Support (L-PRES) project—state coordination offices for the project cover only 18 of the 36 states of Nigeria (NEC 2019, World Bank 2022).
- **Absence of public-private coordination at scale.** The Livestock Sector Donor Working Group is a positive step but does not yet extend to domestic private actors. Moreover, the Development Bank of Nigeria credit line for livestock sector development activities, primarily for use by the private sector, remains largely not in operation (FMLD 2025b).

5. INVESTMENT AND SCALING PATHWAYS

Diagnosis and policy review point clearly to where capital must flow for the sustainable development of Nigeria's livestock sector. This section uses such evidence to suggest practical, scalable investment pathways. Six priority investment areas anchor the livestock growth agenda, sequenced so that productivity-enhancing systems around improved feed and animal health services create the conditions for scaling production, supported in turn by market infrastructure and value chain development, with digital systems and finance as cross-cutting enablers (FMARD and World Bank 2020, World Bank 2022).

5.1 Priority investment areas

Feed systems and inputs. Nigeria imported livestock feed valued at USD 50 million in 2025. Feed is the single biggest cost for commercial poultry and cattle production operations in Nigeria (USDA–FAS 2026). Investment is needed in local feed manufacturing plants that are co-located with grain aggregation hubs, alternative protein sources, including insects, like black soldier fly, soybean meal, and cassava by-products, grain aggregation infrastructure, and digital market information platforms for feed pricing transparency. A 30 percent reduction in the feed import bill within four years is achievable through the establishment of three to five regional feed mill clusters.

Veterinary services and animal health. The Livestock Productivity and Resilience Support (L-PRES) Project is rolling out the Private Veterinary Practice Programme across 18 states (World Bank 2024a). However, gaps remain in the northern pastoral belt where zoonotic risk is high. Priorities are scaling the program to all 36 states, building disease surveillance capabilities and diagnostic laboratory capacity, establishing mobile veterinary units for pastoral communities, systematically creating herd-health records that are linked to a national livestock identification system, and strengthening the National Veterinary Quarantine Service for certification of livestock exports.

Improved breeds and genetics. The Federal Ministry of Livestock Development prioritizes the development of dual-purpose livestock breeds that are adapted to Nigeria's tropical climate (FMLD, L-PRES, and ILRI 2026b). To do so, investment priorities include nucleus breeding farms using public-private financing, artificial insemination and embryo transfer networks, and adapted breed trials with international partners (Kimani 2022).

Pastoral market infrastructure. The Africa Pastoral Markets Development Platform anchors a USD 3 billion private investment push that targets livestock corridors and market systems across northern and central Nigeria. This effort is supported by the African Union–Inter-African Bureau for Animal Resources and the Gates Foundation (AU-IBAR 2024). The investment priorities for the platform are livestock market yards and trading posts along pastoral corridors, market information systems, cold chain linkages to urban processing, and conflict-sensitive market designs.

Cold chains and agro-processing. The African Development Bank-funded Special Agro-Industrial Processing Zones provide anchor infrastructure for agrifood processing across eight states (AfDB 2021). The first processing zone was opened in Kaduna in April 2025. The priorities for the design and development of the processing zones are that they include modern abattoirs and meat processing plants to serve both domestic and export markets and

chilled logistics networks. Poultry processing conducted in the agrifood processing zones is intended to be integrated with improved-breed programs serving the poultry producers supplying the processing facilities.

Dairy value chains. With most processed dairy products consumed in Nigeria being imported, a domestic industry serving urban demand for such products is achievable through village-level milk collection centers with cooling tanks, small-scale pasteurization, and Ultra-High Temperature (UHT) milk processing units. Dairy cooperatives are to be strengthened so that they increasingly have access to Development Bank of Nigeria credit lines (USDA-FAS 2025b, Imohimi 2026).

5.2 Livestock sector scaling pathway

A pathway for scaling-up the development of Nigeria's livestock sector can be described based on sequentially meeting the investment needs described in the previous sub-section. There are five phases to this development pathway—foundational investments, strengthening input systems, strengthening animal health systems, putting in place robust livestock markets and market support services, and integrating Nigerian markets with regional and international livestock markets (Table 5-1).

Table 5-1 Scaling pathways for Nigeria's livestock sector

Investment phase	Focus and key actions	Horizon
1. Foundational	• Finalize and operationalize the Nigeria Livestock Master Plan (NLMP). • Integrate NMLP parameters into the National Livestock Growth Acceleration Strategy. • Conduct zonal production system mapping, building on work done in Adamawa and Oyo in 2025.	2027
2. Livestock input systems	• Achieve target of a 30% reduction in Nigeria's feed import bill within four years. • Establish three to five regional feed mill clusters, co-located with grain aggregation hubs. • Launch a national nucleus livestock breeding program. • Channel Development Bank of Nigeria credit lines to animal feed processors and livestock breeding enterprises.	2028
3. Animal health systems	• Scale the Private Veterinary Practice Programme to all 36 states. • Strengthen the National Veterinary Quarantine Service. • Invest in mobile veterinary units. • Link herd-health records to a National Livestock Identification and Traceability System as a prerequisite for improved market services and access to insurance for livestock producers.	2026 to 2029
4. Livestock market systems	• Achieve target of an increase in the value-addition ratio of livestock value-chains in Nigeria from under 10 percent to more than 40 percent. • Use Special Agro-Industrial Processing Zones as anchor points for private abattoirs, meat processing, and cold-chains. • Attract anchor investors in livestock processing through blended finance. • Develop regional livestock export corridors under the Economic Community of West African States (ECOWAS)	2027 to 2032
5. Regional and international market integration	• Deploy livestock market information systems. • Develop index-based livestock insurance linked to timely satellite imagery on pasture conditions. • Leverage for livestock trade development much of the USD 3 billion mobilized under the Africa Pastoral Markets Development platform. • Integrate diaspora and impact finance to expand Nigeria's livestock trade, both regionally and globally.	2027 to 2032

Source: Authors' construction based on FMLD, L-PRES, and ILRI (2026a), AfDB (2021), AU-IBAR (2024), and USDA FAS (2026).

5.3 Key opportunities

Six opportunities for the development of Nigeria's livestock sector are investment-ready (FMLD, L-PRES, and ILRI 2026b, AU-IBAR 2024, AfDB 2021, USDA–FAS 2025a).

- The Pastoral Markets Development platform, which is supported by the African Union–Inter-African Bureau for Animal Resources and the Gates Foundation, has mobilized USD 3 billion in private investment with Nigeria as the primary focus country for the platform's operations.
- The USD 2.5 billion commitment of JBS S.A., the large Brazilian meat processing company, to construct and operate six processing plants could transform the value-addition ratio for livestock value chains in Nigeria from below 10 percent toward 60 percent, contingent on organized livestock supply chains feeding the processing plants.
- Dairy import substitution represents a USD 1.5 billion annual market opportunity.
- The Nigeria Livestock Master Plan provides a bankable investment framework modeled on Tanzania's USD 624 million success.
- The Special Agro-Industrial Processing Zone program offers an investment of more than USD 510 million in the construction of anchor infrastructure for livestock producers across eight states.
- Seven US animal-health export protocols signed in December 2024 open pathways for genetics, veterinary products, and African Continental Free Trade Area (AfCFTA)-aligned export markets.

The scale of investor interest now extends well beyond these initial commitments. The JBS processing plants alone are projected to create over 50,000 direct and indirect jobs. In 2026, the Nigerian Association of Chambers of Commerce, Industry, Mines and Agriculture unveiled a private-sector-led livestock investment initiative valued at around USD 50 billion that is aligned with the National Livestock Growth Acceleration Strategy. This initiative is aimed at significantly expanding red meat, dairy, and leather production in Nigeria as priority import-substitution value chains. In parallel, the government has set a target of attracting a further USD 5 billion in financing and creating over 100,000 value-chain jobs (Ecofin Agency 2026, Clare 2025). An important lower-cost opportunity lies in revitalizing the country's 38 moribund livestock facilities, which were built 60 to 70 years ago and are now mainly idle. Rehabilitating these could provide ready-made infrastructure for breeding programs, milk collection networks, and livestock processing, complementing greenfield investment at a fraction of the entry cost (Clare 2025). Capturing these opportunities depends, however, on resolving the binding constraints of power supply, rural roads, and feeder supply chains that the same investors consistently identify.

6. STRATEGIC ACTION PLAN INTEGRATION INPUTS

The investment pathways set out above acquire their full strategic weight only when their economy-wide effects are made visible. Economy-wide modeling captures the spillover, multiplier, and macroeconomic effects that sector-only analyses cannot. For any strategic action plan for Nigeria's livestock sector to reflect the true value of livestock investment, it must reference this modeling evidence base, and not simply production targets (FMAFS 2025). The National Agrifood Systems Investment Plan (NASIP) 2026–2027 was developed with analytical support from the Nigeria Strategy Support Program of the International Food Policy Research Institute. Similarly, the Nigeria Livestock Master Plan 2026–2040 incorporated scenario modeling (FMLD, L-PRES, and ILRI 2026b). The National Fisheries Policy, 2025–2029, was grounded in a comparable WorldFish foresight analysis. These models collectively generate the economy-wide evidence that any sectoral strategic action plan must incorporate.

The findings from economy-wide modeling of the livestock sector in Nigeria presented here could be directly integrated into the narrative and results matrix for a strategic action plan for the sector. We first present the results from the scenario modeling using the economy-wide model for Nigeria and then provide assessments of how the development of Nigeria's livestock sector will contribute to achieving each of the six strategic objectives under the Comprehensive Africa Agriculture Development Programme (CAADP).

6.1 Economy-wide modeling findings

The modeling findings summarized in Table 6-1 were generated by researchers at the International Food Policy Research Institute (IFPRI) who developed several agrifood sector development scenarios for Nigeria that were then assessed using an economy-wide model for Nigeria developed by IFPRI and its partner institutions (IFPRI 2026). These modeling results are presented here to provide an explicit analytical foundation for the content of a strategic action plan for the development of Nigeria's livestock sector.

Table 6-1 Nigeria—Livestock-relevant insights from economy-wide modeling scenarios

Modeling finding	Economy-wide implications
Non-farm employment multiplier from livestock value-chain growth of between 0.14 and 0.18	A 10% increase in output from livestock value chains is expected to generate between 1.4% and 1.8% growth in non-farm employment. This employment multiplier range exceeds that of growth in staple crops. The National Livestock Growth Acceleration Strategy target of achieving livestock value-chain growth of between USD 32 billion and USD 74 billion can be expected to generate between 2 million and 3 million non-farm jobs.
Reducing the cost of animal feed by 20% is expected to increase poultry output by over 15% and reduce poultry prices for consumers by about 8%	Cutting feed costs by 20% through domestic animal feed manufacturing would raise poultry output by about 15% and cut consumer prices by about 8%. Cattle productivity gains due to such reductions in feed costs are estimated to add NGN 2.4 trillion to Nigeria's GDP by 2030.
Devoting 10% of the annual national government budget to agriculture will generate an additional 1.2% growth in AgGDP	Sustained 10% allocation of the national budget to agriculture would generate 1.2% additional annual AgGDP growth for Nigeria. The livestock sub-sector AgGDP multiplier is higher than that of the agriculture sector-wide multiplier. This is due to past severe underinvestment in the livestock sub-sector.

Modeling finding	Economy-wide implications
National Livestock Growth Acceleration Strategy (NL-GAS) pathway: livestock \$32B → \$74B by 2035	The International Monetary Fund and the World Bank project that Nigeria's economy will grow annually between 3.9 and 4.2 percent annual growth in the medium-term. This economy-wide rate of growth should result in the GDP of the livestock sector growing from USD 32 billion annually to USD 74 billion.
Gender parity in livestock is estimated to lead to a productivity increase in the sector of up to 20%	Women are often the primary managers of livestock in farming households. Closing the gender gap in agricultural and, specifically, livestock extension, credit, and technology is expected to raise household livestock productivity by up to 20%.
African Continental Free Trade Area (AfCFTA)-related trade—Nigeria to become a net exporter of processed livestock products by 2034	Trade modeling projections suggest that Nigeria will be a net exporter of processed livestock and fish products by 2034 if investments are made to meet sanitary and phytosanitary standards, build cold chain logistical networks, and to increase commercial value-addition operations. This should result in Nigeria gaining more than USD 2.5 billion in its annual trade balance

Source: FMAFS (2025), FMLD, L-PRES, and ILRI (2026b), World Bank (2024a, 2025), USDA FAS (2026), World Bank (2024b), Aragie et al. (forthcoming).

Note: GDP= Gross Domestic Product, AgGDP=Agricultural Gross Domestic Product

Three modeling streams are relevant for contributing to a strategic action plan for the development of Nigeria's livestock sector:

- First, the multiplier and AgGDP-growth results derive from IFPRI's economy-wide modeling for Nigeria, which uses a Social Accounting Matrix (SAM) multiplier and Computable General Equilibrium (CGE) framework, specifically the Rural Investment and Policy Analysis (RIAPA) model (Aragie et al. forthcoming). The model is used to trace how investment in a given sector propagates through production, employment, incomes, and demand across the wider economy. This RIAPA analysis underpinned the National Agrifood Systems Investment Plan (NASIP) 2026–2027, developed with analytical support from IFPRI's Nigeria Strategy Support Program (FMAFS 2025).
- Second, the sector scenario projections for livestock draw on the Nigeria Livestock Master Plan, including the Livestock Sector Analysis and Investment Roadmap. This was prepared by the Federal Ministry of Livestock Development, the Livestock Productivity and Resilience Support (L-PRES) Project, and the International Livestock Research Institute, with World Bank support (FMLD, L-PRES, and ILRI 2026a, 2026b, World Bank 2024a) World Bank, n.d.).
- Third, cross-sectoral trade projections and results related to the African Continental Free Trade Area (AfCFTA) draw on both IFPRI's economy-wide modeling and its trade modeling. Because these are secondary results, the specific figures cited in Table 6-1, including multiplier ranges, AgGDP growth, and trade balance projections, should be read cautiously as being indicative of the direction and approximate magnitude of likely impacts.

6.2 Integration language by Comprehensive Africa Agriculture Development Programme (CAADP) strategic objective

Strategic Objective 1—Production, agro-industrialization, and trade. Nigeria commits to increasing livestock output from USD 32 billion (2025) to USD 74 billion by 2035, a 130 percent increase that will be driven primarily by livestock productivity intensification and agrifood industrialization and not land expansion (USDA–FAS 2026, Natsa 2025).

Investments center on the creation between 2026 and 2028 of three to five regional feed manufacturing clusters and the establishment of national nucleus breeding programs for key types of livestock over the same period. A National Livestock Identification and Traceability System is planned to become operational in 18 states by 2028, with a nationwide roll-out by 2031. The Private Veterinary Practice Programme will be operative in all 36 states by 2029, sharply expanding the access of livestock producers to veterinary services. By 2030, six commercial-scale meat and dairy processing facilities are to be established, anchored in Special Agro-Industrial Processing Zones.

Strategic Objective 2—Investment and financing. The strategic action plan for Nigeria's livestock sector will incorporate a credible fiscal pathway toward the CAADP commitment of 10 percent of the annual public budget being devoted to agriculture—6 percent by 2027, 8 percent by 2029, and 10 percent by 2031—with livestock, as well as fisheries, receiving a minimum 25 percent of the capital budget devoted to agriculture by 2028, with this target rising to 30 percent by 2031 (FMAFS 2025). Program resources to be drawn upon for this purpose include the Livestock Productivity and Resilience Support (L-PRES) Project, which will expand to 36 states by 2029 (World Bank 2024a), the Africa Pastoral Markets Development platform, with a funding mobilization target of USD 3 billion (AU-IBAR 2024), and the development of an index-based livestock insurance program that will be operational in five states by 2028 and 15 by 2032, targeting 500,000 pastoralists.

Strategic Objective 3—Food and nutrition security. The strategic action plan for Nigeria's livestock sector will position livestock as a nutrition delivery system. The government of Nigeria is committed to increasing domestic dairy availability from 8 to 30 liters per capita by 2035. In addition, the government seeks to ensure that 20 percent of the National School Feeding Programme's protein supply is domestically sourced by 2030. It is also to operationalize One Health as a central component of the Private Veterinary Practice Programme, reaching 60 percent of commercial livestock operations by 2029. As one element of promoting human health through improved animal health services, six regional veterinary diagnostic laboratories are to be built by 2030, and domestic veterinary vaccine production is to meet all of Nigeria's needs for combating foot-and-mouth disease, Newcastle disease, and Peste des Petits Ruminants by 2032.

Strategic Objective 4—Inclusivity. Women constitute over 60 percent of the workforce in Nigeria's livestock sector, yet receive under 20 percent of the credit and extension services availed to livestock producers (GAIN, Johns Hopkins University, Cornell University, and FAO 2026). The strategic action plan for Nigeria's livestock sector commits to publishing sex-disaggregated data on Nigeria's livestock production in all Biennial Review submissions under the Comprehensive Africa Agriculture Development Programme from 2027. Women are also to receive at least 40 percent of the value of all disbursements for livestock production and processing of the Development Bank of Nigeria and the National Agrifood Systems Investment Plan (NASIP). Women-specific dairy and poultry programs will be established, and 100,000 youth jobs are to be created in livestock value chains, as well as fisheries, by 2032.

Strategic Objective 5—Resilience. Climate-smart investments in the livestock sector in Nigeria include:

- The production of drought-tolerant forage across 5 million hectares in the pastoral belt of the country by 2032,

- Establishing a pastoral early warning system in 12 northern states by 2028,
- Developing and introducing to farmers climate-adapted dual-purpose livestock breeds,
- Ensuring that Nigeria meets the methane reduction protocols for livestock aligned with Nigeria's nationally determined contribution, and
- Ensuring that most livestock-producing enterprises have access to index-based livestock insurance products.

Strategic Objective 6—Governance. Proposed governance reforms in the livestock sector at the federal level include a Livestock-Fisheries-Agriculture Coordination Mechanism among federal ministries and agencies at the Permanent Secretary level to be established by the fourth quarter of 2026 and mandating that the Federal Ministry of Livestock Development be a full Joint Agricultural Sector Review co-convenor from the 2026 cycle. State-level livestock action plans are to be developed by all 36 states by December 2026. A National Livestock and Fisheries Data Observatory will be operational by 2030, bringing together data on livestock production and marketing from local, state, and federal levels.

6.3 Alignment with National Agrifood Systems Investment Plan and the 2026 budget

The National Agrifood Systems Investment Plan, 2026–2027 (NASIP), which comprises seven programs and is budgeted to cost N 6.5 trillion, is Nigeria's primary implementation vehicle for the Comprehensive Africa Agriculture Development Programme (CAADP) (FMAFS 2025). The National Livestock Growth Acceleration Strategy, while in place, has not yet been structured as an explicit investment program with dedicated budget lines and results indicators. Required actions include adding the National Livestock Identification and Traceability System rollout and the National Veterinary Research Institute recapitalization as explicit deliverables of government agencies.

On the fiscal baseline, Nigeria's 2026 budget of N68.3 trillion allocates N1.45 trillion to the Federal Ministry of Agriculture and Food Security, with the Federal Ministry of Livestock Development receiving approximately N75 billion (State House 2026, Agribusiness Africa 2026). The share of the total annual budget going to agriculture and livestock in 2026 is 2.2 percent. Consequently, reaching the CAADP target of 10 percent of the annual public budget being directed to the agrifood sector—or NGN 6.83 trillion—requires a phased increase of over NGN 5 trillion of the government budget that is annually allocated to agricultural activities, including livestock.

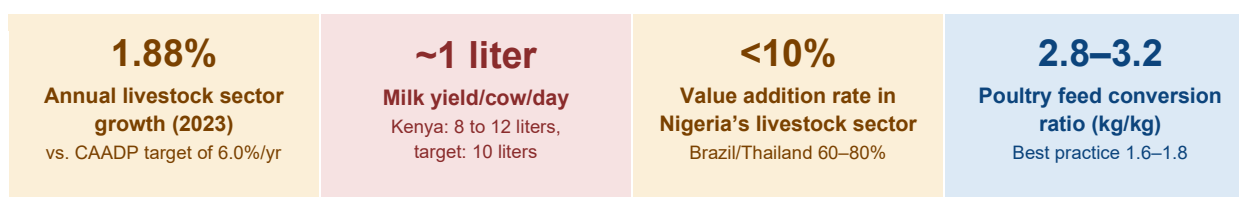
7. LIVESTOCK SECTOR CHALLENGE ANALYSIS: ROOT CAUSES AND INTERLINKAGES

The constraints summarized in Section 3 are the binding factors on growth in Nigeria's livestock sector that, if unresolved, will prevent any other investment or policy intervention from achieving its intended impact. This section examines the root causes and systemic interlinkages of the three most critical livestock challenge domains—productivity and yield gaps, the animal health and disease burden, and animal feed system failures. A fourth more systemic and less livestock-specific constraint is tied to climate risks and environmental sustainability. Each of the four is analyzed for its structural and institutional drivers, sector-level impacts, and implications for a strategic action plan for Nigeria's livestock sector.

7.1 Productivity and yield gaps

Several key statistics to document the poor productivity of Nigeria's livestock sector are presented in Figure 7-1. The root causes of the livestock productivity gap are structural and mutually reinforcing:

Figure 7-1 Livestock productivity indicators for Nigeria against benchmarks



Source: PLRIC (2025), ILRI/FMLD (2025), NBS (2024), FAOSTAT (2024).
Note: CAADP= Comprehensive Africa Agriculture Development Programme

- Genetic underperformance.** Approximately 99 percent of Nigeria's cattle are indigenous breeds, including White Fulani, Red Bororo, and Sokoto Gudali. These cattle are typically managed under extensive systems. While these breeds have high adaptability to harsh agroclimatic conditions, they have low production potential. For example, their average milk yield is one liter per cow per day compared to an achievable daily milk yield of 10 liters with improved genetics and management of dairy cows. No commercial-scale nucleus breeding program, artificial insemination network, or livestock gene bank for improving the genetic potential of Nigeria's livestock is currently operational nationally (Kimani 2022, PLRIC 2025).
- Animal feed systems failure.** Feed quality and availability directly limit the expression of the genetic potential of Nigeria's livestock—even improved animal breeds cannot reach their potential productivity targets without adequate nutrition. Feed costs consume 60 to 70 percent of production costs in intensive commercial livestock systems. High feed prices have compressed commercial margins to near-zero in the poultry sub-sector (FMLD, L-PRES, and ILRI 2026b, USDA–FAS 2025a).
- Limited agricultural extension reach.** The Agricultural Development Programmes, which are the state-level agricultural extension agencies, are chronically underfunded and understaffed. In consequence, fewer than 30 percent of commercial livestock operations have access to regular veterinary or production advisory services. Modern

animal husbandry techniques reach only a small fraction of producers (PLRIC 2025, World Bank 2024a, FMLD, L-PRES, and ILRI 2026b).

- **No processing infrastructure.** With no operational commercial-scale cattle processing facility as of 2025, the value chain for cattle terminates at informal slaughter operations. Without larger-scale meat processing plants, quality differentiation is impossible, cold chain value-capture is absent, and export markets for Nigeria's meat are inaccessible. The commercial returns to farm-level livestock productivity improvement will be capped at a very low level without greater investment in modern and larger-scale livestock processing enterprises (PLRIC 2025, FMLD, L-PRES, and ILRI 2026b).
- **Insecurity and pastoral disruption.** Herder-farmer conflict disrupts herd management, forces unplanned movement, and reduces investment in productivity-enhancing livestock inputs. Outbreaks of conflict also sharply reduce the access of livestock producers to veterinary services and market information.

7.2 Animal health and disease burden

Nigeria faces an endemic animal disease burden that is both economically devastating and a significant public health threat. The 131 Contagious Bovine Pleuropneumonia outbreaks recorded in 2025 sit alongside endemic foot-and-mouth disease, Peste des Petits Ruminants, Newcastle disease, brucellosis, and trypanosomiasis. Surveillance systems significantly underreport the true burden (Al-Mustapha et al. 2025). The root causes are primarily structural in nature.

- **Structural underinvestment in the National Veterinary Research Institute.** NVRI at Vom is Nigeria's only federal veterinary vaccine production facility. However, its production capacity is acknowledged to be below national needs for vaccines to combat foot-and-mouth disease, Peste des Petits Ruminants, and Contagious Bovine Pleuropneumonia. The Presidential Livestock Reforms Implementation Committee has recommended a new National Animal Diseases Vaccines and Biologicals Production Institute, but this is still in the early planning stage (PLRIC 2025, WOAH 2026).
- **Weak surveillance of animal health and no early warning system.** The animal health surveillance relies on passive reporting from understaffed state veterinary services that lack diagnostic laboratory equipment. The absence of a National Livestock Identification and Traceability System makes epidemiological investigation of outbreaks structurally impossible.
- **Last-mile failure in the delivery of livestock health services for pastoral communities.** Over 15 million pastoralists manage 82 percent of Nigeria's cattle in mobile production units across vast, often conflict-affected areas. Fixed-clinic and scheduled-visit models for the provision of veterinary care cannot reach them. Mobile veterinary brigades have been proposed by the Presidential Livestock Reforms Implementation Committee but are not yet operational at scale (PLRIC 2025, FMLD, L-PRES, and ILRI 2026b).
- **Antimicrobial resistance risk.** The relatively common informal use of antimicrobials to treat illnesses in animals without any veterinary oversight, appropriate dosing, or

withdrawal periods is creating antimicrobial resistance pressure in several of the common livestock diseases in Nigeria. The implementation of programs to monitor antimicrobial resistance in livestock across Nigeria is only at a pilot stage, at best.

These risks converge in a One Health emergency that is currently under-managed, affecting the health of both the human and animal populations of Nigeria. Brucellosis, bovine tuberculosis, Rift Valley Fever, and avian influenza all have active transmission pathways from livestock to humans. The concentration of the livestock disease burden in pastoral communities, which also have the weakest access to human health services, creates compounding risks. The National One Health Strategic Plan 2.0 (2024–2029) is being reviewed with the Federal Ministry of Livestock Development as a co-lead of the effort. However, the plan has not yet been operationalized through the allocation of dedicated livestock disease-surveillance financing (Al-Mustapha et al. 2025, FAO 2026).

7.3 Animal feed system failures

Feed systems failures are a binding constraint for livestock sector growth in Nigeria. Their root causes are structural and macroeconomic:

- **No large-scale domestic feed manufacturing industry.** Nigeria lacks the regional feed manufacturing clusters that are integrated with grain aggregation enterprises, quality testing, and storage. Such feed manufacturing centers are needed to supply an expanding commercial livestock sector. The disconnect between grain surplus zones in northern Nigeria and feed demand zones—particularly the commercial poultry production areas in southwest and southeast Nigeria—reflects both logistical and institutional challenges (FMLD, L-PRES, and ILRI 2026a, USDA–FAS 2025a).
- **Grain price volatility and aggregation failure.** Maize, the primary energy component in poultry and pig feed, is subject to extreme seasonal price swings in Nigeria. The absence of functioning grain aggregation systems, commodity exchanges, and forward contracts for maize exposes feed to unmanageable input-cost volatility in their feed manufacturing.
- **Currency depreciation pass-through.** Feed mills depend on several imported ingredients, including soybean meal, lysine, methionine, vitamins, and mineral premixes. The sharp depreciation of the Naira in 2023 and 2024 dramatically increased the Naira-denominated cost of these inputs, squeezing margins for both manufacturers and commercial livestock producers (USDA–FAS 2025a, NBS 2024).
- **Pasture and forage degradation.** For pastoral systems, the primary feed base is rangeland. Desertification in the north, land conversion to cultivation across the country, and the loss of grazing reserves have degraded the pastoral feed base. Increasingly limited grazing land is a direct driver of the extension of the seasonal migration of pastoralists even farther southward, which intensifies and extends herder-farmer conflicts.

The interlinkages between animal health and animal nutrition are decisive. Feed failure drives the livestock productivity gap, which causes income losses for livestock producers, which reduces their investments in the health of their animals, which deepens the burden of animal disease in Nigeria, which causes further livestock productivity losses. These are

reinforcing cycles, not linear problems, and they require systemic responses across feed, health, feed manufacturing, livestock processing and marketing infrastructure, and finance simultaneously, rather than single-point interventions. The common structural solution across the feed challenge is domestic feed value chain development anchored in three to five regional manufacturing clusters co-located with grain aggregation hubs, alongside the development of domestic soybean production and alternative protein supply chains, such as black soldier fly, to reduce import dependency for animal feed ingredients (FMLD, L-PRES, and ILRI 2026b, Kimani 2022, PLRIC 2025).

7.4 Climate risks and environmental sustainability

Climate change is a multiplier that amplifies every other challenge in the livestock sector. Nigeria loses approximately 351,000 hectares of arable land to desert annually in the north, while Lake Chad has shrunk to roughly 10 percent of its extent in the 1960s (FMEnv 2021, FGN 2022). The risk pathways for livestock production in Nigeria are distinct and compounding:

- **Pasture degradation and water scarcity.** Rising temperatures and declining rainfall, particularly in northern Nigeria, are reducing the quality and extent of pasture available to the 15 million-plus pastoralists who depend on rangeland as the primary feed resource for their animals. This is the direct driver of southward migration, herder-farmer conflict, and the progressive erosion of the pastoral production base (Majekodunmi 2022, FMEnv 2021, FGN 2022)
- **Heat stress on productivity.** High ambient temperatures directly reduce feed intake, milk production, reproductive efficiency, and growth rates in cattle. Indigenous breeds have higher heat tolerance than improved exotic breeds, creating a productivity-adaptation trade-off that requires investment in locally adapted genetics, shade infrastructure, and water access.
- **Increased disease transmission under climate stress.** Climate-stressed animals have compromised immune systems, which increases their susceptibility to endemic disease. Climate-driven migration also introduces livestock into new ecological zones where vector populations, such as tsetse flies and ticks, pathogen reservoirs, and disease-naïve populations interact in novel combinations.
- **Extreme weather event losses.** Flash floods in river systems in the north of Nigeria in 2022 and 2024 destroyed pasture, killed livestock, and disrupted markets for extended periods. These and other extreme weather events are increasing in frequency and are not captured in standard productivity-loss accounting. No index-based livestock insurance linked to satellite pasture data operates at scale, leaving these losses entirely uninsured.

Pastoralists thus face a documented triple burden of disease outbreaks, conflict, and climate change (Majekodunmi 2022). Nigeria's nationally determined contribution (NDC) to cut greenhouse gas emissions and adapt to climate-change impacts commits the country to undertake climate-smart pasture management and livestock methane reduction, but the climate-finance pipeline for the livestock sector remains choked and inactive, a gap the strategic action plan for Nigeria's livestock sector must close by linking livestock investments

to Green Climate Fund, Adaptation Fund, and NDC implementation finance (NDC Partnership 2025).

As with the interlinkages between animal health and animal nutrition, the interlinkages between climate change and livestock productivity are also decisive. Climate change results in pasture degradation, which results in feed scarcity for the herds of livestock producers, which exacerbates conflict over land for agriculture and grazing, which disrupts agricultural markets, which causes further livestock productivity losses.

Table 7-1 summarizes how these various challenges interact to slow down or even halt growth in Nigeria's livestock sector. The interactions of these specific technical and institutional challenges pose reinforcing cycles that limit growth in livestock production and productivity and require a range of systemic responses that must be undertaken simultaneously. Relying on single-point interventions will not build substantial momentum for livestock sector growth in Nigeria.

Table 7-1 Summary matrix of the interactions of challenges to growth in Nigeria's livestock sector

Challenge	Links to	CAADP Strategic Objective	Livestock sector strategic action plan response
Productivity gap	Feed failure Disease burden No large-scale commercial livestock processing	SO1	Nigeria Livestock Master Plan feed clusters National Veterinary Research Institute recapitalization Operationalization of the memorandum of understanding with JBS S.A., the large Brazilian meat processing company
Animal health burden	Feed (nutrition-immune link), climate stress, conflict	SO3 (One Health)	Investments in the National Veterinary Research Institute Investments in the National Animal Production Research Institute Establish a National Livestock Identification and Traceability System Form mobile veterinary brigades Integration into One Health SP 2.0 strategic plans
Feed systems failure	Productivity, conflict (pastoralism), climate (pasture)	SO1 + SO2	Regional feed clusters Animal feed ingredient substitutes, such as black soldier fly or cassava by-products Establish grain aggregation systems to supply animal feed manufacturers
Climate risks	All challenges (amplifier)	SO5 + SO3	Establish insurance program to manage climate risks adversely affecting livestock production Develop and disseminate widely drought-tolerant forage Unlock Nationally Determined Contribution financing
Financing gap	All challenges (enabling)	SO2	Progress towards achieving CAADP 10% of total annual government budget being devoted to agriculture. Create and release Development Bank of Nigeria credit lines for livestock production Develop blended finance platforms for investment in the livestock sector
Data fragmentation	All challenges (evidence base)	SO6	National Data Observatory in place by 2030 Generate sex-disaggregated CAADP Biennial Review data from 2027

Source: Authors' synthesis. See sections 3 and 7 for information on the primary sources supporting each linkage between the challenges facing Nigeria's livestock sector.

Note: CAADP= Comprehensive Africa Agriculture Development Programme.

8. STRATEGIC RECOMMENDATIONS AND PRIORITY ACTIONS

For any strategic action plan for Nigeria's livestock sector to be effective, actions must be taken by government agencies at all levels, by Nigeria's development partners, and by livestock enterprises in the private sector. Here, recommendations are made on the role that each of these actors must play to sustainably and substantially expand livestock production in the country.

8.1 For the government

- Finalize and gazette the Nigeria Livestock Master Plan as the official investment framework for the Federal Ministry of Livestock Development. The master plan must be integrated into the budget submissions for the National Livestock Growth Acceleration Strategy and the National Agrifood Systems Investment Plan, 2026–2027.
- Establish a binding federal-state livestock implementation compact with explicit transfer mechanisms for funding and other resources, quarterly performance reporting, and clear sanctions. The compact should be piloted in several anchor states before any national rollout.
- Complete the National Livestock Baseline Study, which was initiated in May 2026, and develop the National Livestock Identification and Traceability System. Both of these information sources are foundational for the establishment of both an animal-health certification system and the provision of insurance to livestock producers.
- Resolve the issues under the memorandum of understanding between the Development Bank of Nigeria and the Federal Ministry of Agriculture and Food Security that are hampering the provision of livestock-sector lending at a commercial scale.
- Integrate climate-risk assessments into all new livestock infrastructure investments.
- Recapitalize the National Veterinary Research Institute to produce sufficient doses of vaccines to combat foot-and-mouth disease, Peste des Petits Ruminants, and Contagious Bovine Pleuropneumonia in the country.

8.2 For development partners and financiers

- Prioritize blended-finance structures involving financing from both public agencies and private enterprises for establishing commercial feed manufacturing facilities and cold chain logistical networks for livestock products. Such financing will be required for investments where the commercial returns are seen to be viable but first-mover risks are high.
- Coordinate financial support for livestock producers through the Livestock Sector Donor Working Group and the National Agrifood Systems Investment Plan platform to avoid fragmentation.
- Incorporate smallholder-inclusion conditions in the design of large-scale anchor investments in the livestock sector, such as in the Special Agro-Industrial Processing

Zones or under the Africa Pastoral Markets Development platform. Given the significant role of livestock in the livelihoods of many smallholder farming and pastoral households, displacement of smallholders by commercial operators must be avoided.

- Develop index-based insurance products for pastoral livestock producers—a market that does not yet exist at scale in Nigeria. The indices used would be partly developed from analysis of current satellite imagery on pasture quality.

8.3 For private sector investors

- The feed sector offers the strongest near-term commercial opportunities for large-scale investment in the livestock sector of Nigeria, as there is high import-substitution potential, available raw materials, and a large captive market across commercial poultry and cattle production, as well as in aquaculture.
- Abattoir and cold chain investments linked to Special Agro-Industrial Processing Zone anchor infrastructure will benefit from access to land concessions, shared utilities, and export facilitation.
- Dairy processing offers immense possibilities for investors in Nigeria. With the current high dependence on dairy imports, strong urban demand growth, and minimal domestic competition, it is likely that future growth in domestic dairy production will meet and even exceed investor expectations.
- Engage the Africa Pastoral Markets Development Platform as the coordination mechanism for pastoral livestock investment for both private and public agencies investing in the sector. Coordination is required to more efficiently access financial flows into the sector, to identify co-investors, and to facilitate any modification or reforms to the policy environment that guides livestock sector growth in Nigeria.

8.4 Summary of actions to foster growth in Nigeria's livestock sector

Of course, government agencies, Nigeria's development partners, and livestock enterprises in the private sector will not operate in isolation as they work to expand Nigeria's livestock sector. Table 8-1 summarizes by the main challenges constraining growth in the sector what actions are needed and who among the various stakeholders in the sector should be expected to be part of the efforts to take those actions in the near- to medium-term.

Table 8-1 Priority actions for the livestock sector

Challenge	Priority actions (top 3)	Leads	Timeline
Productivity	• National nucleus breeding program • Regional feed clusters (3–5) • Six processing plants of JBS S.A., the large Brazilian meat processing company	Federal Ministry of Livestock Development International Livestock Research Institute Development Bank of Nigeria JBS, S.A. and other large-scale livestock processing enterprises	2026 to 2030
Animal health	• National Veterinary Research Institute—recapitalization to create new vaccines, expand vaccine production • National Livestock Identification and Traceability System rollout to 18 states by 2028 • Establish mobile veterinary brigades in pastoral zones	Federal Ministry of Livestock Development National Veterinary Research Institute Livestock Productivity and Resilience Support (L-PRES) Project Nigerian Veterinary Medical Association	2026 to 2029
Feed systems	• Livestock feed cluster program • Grain aggregation infrastructure • Exploration and exploitation of domestic substitutes for imported ingredients for manufacturing animal feed	Federal Ministry of Livestock Development Development Bank of Nigeria Food and Agriculture Organization of the United Nations (FAO) International Institute of Tropical Agriculture Private sector feed producers and agrifood processors	2025 to 2028
Climate risk	• Livestock climate insurance, scaled up to 15 states • Establishment of drought-tolerant forage on 5 million ha • Establishment of livestock methane reduction protocols	Federal Ministry of Livestock Development Federal Ministry of Environment Green Climate Fund Climate Risk and Early Warning Systems (CREWS) international agency	2027 to 2033
Conflict / inclusion	• Formalize pastoral corridors in six states • Construct conflict-sensitive market infrastructure • Ensure women make up at least 40 percent of beneficiaries of support to livestock producers	Federal Ministry of Livestock Development Presidential Livestock Reforms Implementation Committee State-level ministries and agencies International Fund for Agricultural Development	2026 to 2028

Source: Authors' synthesis based on PLRIC (2025), FMLD, L-PRES, and ILRI (2026a, 2026b), USDA–FAS (2026), World Bank (2024a), African Union and AUDA-NEPAD (2025)

9. CONCLUSIONS

Nigeria enters the CAADP Kampala Declaration period with the strongest livestock policy architecture in its history. The creation of the Federal Ministry of Livestock Development, the flagship National Livestock Growth Acceleration Strategy (NL-GAS) with its USD 74 billion target for 2035, the first-ever Nigeria Livestock Master Plan, and a USD 500 million Livestock Productivity and Resilience Support (L-PRES) Project together represent a decisive shift in political attention, institutional capacity, and resource flows to Nigeria's livestock sector. Major private capital is mobilizing, including a USD 2.5 billion livestock processing commitment from JBS, S.A., the Africa Pastoral Markets Development platform with a USD 3 billion target, and the Special Agro-Industrial Processing Zone program of the African Development Bank. The strategic foundations for livestock sector growth are in place.

The central finding of this paper, which was drafted to inform the process of creating a strategic action plan for Nigeria's livestock sector, is that the challenges constraining growth in Nigeria's livestock sector are now primarily those of implementation rather than policy design. The sector's annual growth is at less than one-third of the CAADP target, milk yields sit at one-tenth of their achievable level, no commercial-scale cattle processing enterprises exist, the burden of animal disease is endemic and underreported, and failures in the animal feed system of the country cascade across every livestock sub-sector. These constraints are reinforcing rather than isolated, and they will not be resolved by additional strategy documents. They require sequenced execution. Resolve the feed systems and animal health challenges first, because they unlock the productivity gains on which everything else depends. Then address the constraints on livestock sector growth linked to livestock genetics, processing, and market infrastructure, with data systems, finance, and climate resilience as cross-cutting enablers throughout.

For a strategic action plan for Nigeria's livestock sector, this implies five priorities.

- Treat feed systems development as the single highest-leverage intervention, cutting across production, nutrition, and investment objectives.
- Recapitalize the animal-health system, beginning with the National Veterinary Research Institute.
- Build the foundational data infrastructure, completing the National Livestock Baseline Study and establishing the National Livestock Identification and Traceability System, without which no credible results framework can be constructed.
- Establish a binding federal-state implementation compact to close the coordination chasm that resulted in the collapse of the National Livestock Transformation Plan.
- Create the enabling conditions—land, finance, infrastructure, and trade facilitation—that will be required if committed private capital is to be converted into operational investment.

If the strategic action plan delivers on these implementation fundamentals, the sleeping giant that is the livestock sector in Nigeria can finally be roused.

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ABOUT THE AUTHORS

Georgina Njiraini is a development and agricultural economist at Agency for Inclusive Innovations & Development (AIID-AFRICA), Nairobi, Kenya. **Philemon Chelang'a** is the Director of Research and Innovations at AIID-AFRICA, Nairobi, Kenya. **Adho Yattani** is an agricultural researcher with AIID-AFRICA, based in Nairobi, Kenya. **Olufemi Popoola** is a Research Analyst in the Nigeria Strategy Support Program (NSSP) of the Development Strategies and Governance (DSG) Unit of the International Food Policy Research Institute (IFPRI), based in Abuja, Nigeria. **Oliver K. Kirui** is a Research Fellow in the DSG Unit of IFPRI and Leader of IFPRI's Nigeria and Ghana Strategy Support Programs, based in Abuja.

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