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COMITE PERMANENT INTER-ETATS DE LUTTE
CONTRE LA SECHERESSE DANS LE SAHEL
(CILSS)

COMMUNAUTE ECONOMIQUE DU BETAIL ET
DE LA VIANDE DU CONSEIL DE L'ENTENTE
(CEBV)

STUDY ON THE MARKETING CIRCUITS OF LIVESTOCK, MEAT AND STOCK-RAISING PRODUCTS IN THE SAHELIAN AND COASTAL COUNTRIES

GAMBIA

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July 1991

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POLICY AND ORIENTATION FOR LIVESTOCK HUSBANDRY IN THE GAMBIA

The livestock industry has been assuming more and more importance in the livelihood of the population. Apart from being the major source of protein for the population, it provides about eleven per cent of the gross domestic product and contributes substantially to the rural income.

In view of its contribution to the national economy, animal husbandry is regarded by the government as an important activity the full potential of which is not yet exploited.

In the past the main policy objectives for livestock development were:-

- To keep livestock production in balance and at levels consistent with the limitations of the rural resources and to meet the requirements for draught animals.

The current government policy places emphasis on private participation in the development of the livestock industry.

Since the Programme for Sustained Development (PSD) advocates liberalised trade, improvement of production, support for foreign investment and development of private business, the government has consistently withdrawn from direct livestock production activities. Consequently decision was taken to privatise livestock production units owned by the government.

The management of the grazing lands has also been handed over to the livestock owners.

The current government policy encourages the diversification of livestock industry by promoting projects aimed at improving the production and productivity of livestock species e.g. goats, sheep and poultry.

With regards to cattle, the government aims at higher productivity rather than increased number of animals and an increased offtake to reduce pressure on the grazing lands

As to the marketing policy the government has liberalised the sale of livestock and meats through private parties in the local markets.

The livestock marketing board which was established in 1978, had monopoly over the marketing of livestock.

In its present form the livestock marketing board is neither capable of operating to provide enough meat to meet the local requirements nor able to export livestock or meat abroad.

As livestock marketing board is still operating on the basis of the law No.

6 of 1976 which gives it monopoly over exports, private parties cannot export livestock or livestock products.

This denotes that there is no adequate policy and strategy for exporting livestock and meat from The Gambia.

For private parties to operate and export livestock or livestock products, the 1976 law has to be repealed.

2.1 ANALYSIS OF DATA

2.1.1 GENERAL STATISTICS

2.1.1.1 The cattle population has increased rapidly over the past ten years mainly due to the eradication of the major epizootics like rinderpest and the control of other infectious diseases.

The population increased from 194,924 in 1984/85 to 327,000 in 1989/90.

Growth rate is estimated at 3-4% and the rate of offtake is eleven percent (11%).

In 1989 the total number of registered cattle owners was estimated at 20,683 out of 615,000 agricultural inhabitants.

At the national level the average nimber of heads of cattle per owner is estimated at 23.

The majority at cattle as well as owners are found in Maccarthy Island and Upper River Divisions. On the average each owner in these divisions has 27 to 28 heads of cattle.

Next in importance of ownership and population by division is North Bank Dicision followed by Western Division. Lower River Division with 19 heads of cattle per owner has the least of cattle per owner. Herd sizes rnage from 51 to 90 animals.

The production system is mainly of the sedenatry tyoe but migration is practiced in some divisions.

At the national level, the rate stocking has been estimated at 27 animals per Square Kilometer while 39 animals per Square Kilometer has been estimated for Upper River division.

SMALL RUMINANTS

Small ruminants also play an important role in the economy of the country. The small ruminants population has increased over the past ten years.

The population of sheep increased from 135,000 in 1984.85 to 190,000 in 1989/90 while the goat population increased from 187,000 to 250,000 over the same period.

The rate of offtake is estimated at 30%. Ownership of small ruminants is more widespread than cattle ownership.

Sheep and goats are mainly owned and managed by women.

PIGS

Pigs, for religious reasons afe few and they are mainly raised by non-muslims. The population of pigs has increased from 12,000 in 1984/95 to 14,000 in 1989/90.

POULTRY

Two systems of poultry production exists in the country, the traditional and the commercial. Estimates show that the number of birds increased from 345,000 in 1984/85 to 506,000 in 1989/90.

Due to unavailability of data only estimates of the livestock population from 1984 to 1990 were given.

2.1.1.2 EVOLUTION OF CONTROLLED SLAUGHTER OF LIVESTOCK

The slaughter of livestock in the Urban area is carried out at the Abuko abattoir.

Slaughter figures for cattle increased from 3,754 in 1980 to 12,049 in 1990.

The slaughter figures for sheep indicate a decrease from 1,278 in 1980 to 1,237 in 1990 while the figures for goats indicate an increase from 2,247 in 1980 to 2,564 in 1990.

Slaughter of pigs has decreased from 68 to 60 during the same period.

Slaughter of livestock in the Rural area is carried out at the Slaughter Slabs in the Regional Centres. The level of uncontrolled slaughter in the villages is significant.

Statistics on the slaughter at the Regional Centres are incomplete but they may give an indication of the importance of rural livestock slaughter and meat consumption.

2.1.1.3 EVOLUTION OF CONTROLLED EXPORT OF LIVESTOCK BY SPECIES

Livestock marketing board as the sole agent responsible for the export of livestock, used to export cattle to the neighbouring countries.

However with the collapse of LMB, the export of cattle came to a standstill.

Livestock marketing board has exported cattle to Nigeria, Gabon and Ghana.

From 1980 tp 1983 LMB exported a total of 4,974 heads of cattle to Nigeria.

It has also exported a total of 3,303 heads of cattle to Gabon between 1981 and 1987.

In 1988 the livestock marketing board exported 321 heads of cattle to Ghana.

2.1.1.4 EVOLUTION OF EXPORTATION OF MEAT BY SPECIES

As part of its activity LMB was engaged in the export of meat to the neighbouring countries.

In 1984 the LMB exported 2.163 tonnes of frozen meat to Liberia, and 9.09 tonnes to Sierra Leone.

In 1985, it exported 53 tonnes of frozen meat to Sierra Leone.

2.1.1.5 EVOLUTION OF THE AVERAGE CARCASSE WEIGHT BY SPECIES

Data on the average carcasse weight is scanty. Weighing of carcasses was conducted at the Abuko abattoir but due to breakdown of the scale, weighing abandoned. The average carcasse weights registered for 1981, 1983, 1985, 1986 and 1987 are 120, [illegible], 105, 120 kg and [illegible]45 kg. For sheep 10 kg was registered in 1983.

2.1.1.6 EVOLUTION OF MEAT CONSUMPTION BY SPECIES

Data on meat consumption is scanty but according to the FAO study in 1987, the total meat consumption in The Gambia was 4 530 of which [illegible] tonnes were imported.

Total production was 4,119 tonnes of which 117 tonnes were exported. Of the amount of total consumption 40% is estimated to be beef, 20% mutton, 10% pork and 30% chicken. The statistics show that The Gambia covers 91% of its meat requirements.

The projection of production/consumption ratio on the basis of 2% increase of production of livestock is 84% and 81% for all meat and 87% and 82% for beef in 1985 and 2,000 respectively.

Apart from monetary needs, the existence of markets contribute to the factors favouring selling of livestock.

Thus in Upper River division where weekly markets are many and livestock owners can easily take animals to the weekly markets, fourty-three (43) percent of the owners indicated that they sold more animals than they wished to sell, twenty-seven (27) percent of the owners sold enough while thirty percent of the owners sold less.

In Maccarthy Island division where weekly markets are few, seventy (70) percent of the cattle owners indicated that they sold less animals due to lack of markets, twenty (20) percent sold enough while ten (10) percent sold more animals than they wished.

3.1.2 In all divisions the tendency to sell adult males is greater because of their superior weight.

In both Maccarthy Island and Upper River Divisions, sixty (60) percent of the cattle owners prefer to sell bulls, twenty-five (25) percent prefer to sell non-productive adult females whild fifteen (15) percent of the livestock owners sold animals without preference.

The preference for selling adult male sheep and goats is also greater in both divisions.

As regards to sheep, seventy-four (74) percent of the owners prefer to sell rams, twelve (12) percent prefer to sell adult ewes and fourteen (14) percent of the owners sell sheep without preference.

Seventy-five (75) percent of the goat owner sell bucks, eight (8) percent prefer selling females while seventeen (17) percent sell goats without regard to sex or age.

3.1.3 There is also preference in season or period for selling livestock.

During the interviews fifty-five (55) percent of the cattle owners indicated that they prefer to sell animals during the early part of the dry season when the animals have gained weight, ten (10) percent of the owners sell during the rainy season, 2 percent sell during feasts while thirty-three (33) percent of the cattle owners sell animals without regards to season or period.

As for sheep, fourty-seven (47) percent of the owners sell animals during the dry season, nine (9) percent sell during the rainy season, three (3) percent sell during feast and fourty-one (41) percent sell animals without regard to season or period.

Fourty-eight (48) percent of the goat owners sell animals during the dry season, four (4) percent sell animals during the feasts, eleven (11) percent of the owner sell during the rainy season and thirty-seven (37) percent sell without preference.

3.1.4 In the absence of an official pricing system, determination of prices for animals is a major problem in the livestock industry.

As animals are sold by visual estimates of weight and by aargain, the majority of livestock onwers expressed dissatisfaction for the prices paid by the dealers.

In both divisions, fifty-eight (58) percent of the cattle owners expressed dissatisfaction for the prices paid for cattle, while forty-two (42) percent of the owners are satisfied with the prices offered by the dealers.

Sixty-three (63) percent of the sheep owners are satisfied with the prices paid for sheep while thirty-seven (37) percent expressed dissatisfaction for the prices. As for goat owners, sixty-seven (67) percent are satisfied with the selling prices and thirty-three (33) percent feel that the prices offered are low.

3.1.5 In the absence of organized markets and pricing system for livestock, the difficulties encountered by the difficulties encountered by the producers in the marketing of livestock are numerous.

Among them are: difficulties to sell animals at the time of need, difficulties to recover money from dealer as the animals are sold on credit, difficulties in bargaining and the low prices paid for livestock.

3.1.6 Establishment of organized livestock markets and pricing policy for livestock and meat would go a long way to boost the supply of livestock on the

3.3 STUDY OF MARKETING CIRCUITS

3.3.1.1 IDENTIFICATION OF LIVESTOCK MARKETING CIRCUITS.

3.3.1 LIVESTOCK

Before 1985, marketing of livestock was carried out in The Gambia by the livestock marketing board and the traditional cattle dealers.

The LMB purchased livestock directly from the livestock owner or through agents licened by the board. Buying of livestock was carried out at designated villages selected through consultation between the LMB and the area Livestock Owners Association (LOA).

Each buying point was visited by the board's buyers at regular intervals on specific days announced on the national radio.

Traditional cattle dealers were involved only in the purchase of slaughter animals.

The dealer or his agent scouts around the villages for animals to buy and the price of an animal was negociated on the basis of visual estimates of the weight of the animal. In many cases only part payment is made to the owner of the animal and the balance to be paid when the animal is sold.

The dealers transport their animals to the Abuko market using hired private turcks.

The animals are then sold to the butchers who retail the meat in the market.

Presently the private dealers dominate the market. As before, the dealers purchase animals from the producers in the villages or at the weekly markets up country. The animals are transported to Abuko and sold to the butchers.

At the village level, the intervillage sale agent or trader buying animals from stockowners and sell them to rural butchers.

BOTTLENECKS

3.3.1.2 In the absence of offical livestock markets and chanels, the bottlenecks are numerous:- They include lack of credit facilities and transport, difficulties of payment of loans by dealers and butchers, difficulties of selling animals by producers and dealers, absence of fix price policy and lack of processing facilities at the abattoir.

3.3.1.2.1 <u>COMMERCIAL, ECONOMIC AND INSTITUTIONAL ASPECTS</u>

3.3.1.2.2 Significant changes have taken place in the formal channel of marketing in The Gambia. Presently livestock marketing board has the lowest market share in the livestock industry and it has ainadequate organizational marketing finances and human resources strategies. Its physical facilities are inadequate and underutilized.

3.3.1.2.3 In its present sturcture, the LMB cannot survive so therefore privatization has been advocated as the most viable long term solution to the problem of the company. The consultancy report for the National Investment Board (NIB) on LMB proposed the following stages to privatization:-

- Stage I lasting for 24 months
- Period of transformation which would include selling the boards forty (40) percent share holding in GAMTAN in hard currency for buying spare parts and rehabilitation of physical facilites.

  The first stage would also include negotiation with donor countries to provide experts on finance marketing and human resource.

- Stage II lasting for thirty-six (36) months would involve entering into joint ventures with international investors, establishing ranches, feed mills, meat processing facilities and creation of abetter atmosphere for the export of livestock and meat.

- State III complete privatization.
- This stage would involve selling of government shares to an international or local private investor.

This steps are in line with the government's efforts to reverse the over extention of government in the economic life of the country and to create favourable climate for private productive

3.3.4.2 As the total quantity produced in the country is not enough to meet the demand, larg quantities are imported. The tables would give an idea of the importance of milk imports.

3.3.5 With the programme of privatization of livestock production activities and the aim to intensify livestock production, it is hoped that improved husbandry coupled with private milk production ventures would boost the quantity of milk produced to meet the requirements of the population.

4. CONCLUSIONS - RECOMMENDATIONS

The Gambia is habouring a livestock population which is large enough to meet its internal meat requirements and cater for exports of both livestock and meat.

However the absence of organized livestock markets, marketing facilities and pricing policy for livestock and meat is limiting the supply of meat to the local consumers and grounding the export of livestock and livestock products.

Livestok marketing board, the official agent which had monopoly over trade in livestock and meat, is presently undergoing great difficulties and can neither operate adequately to meet the local meat requirements nor can it handle the export trade in livestock and meat.

At present, the traditional dealers which dominate the trade in livestock and meat are faced with numerous constraints which serve as limiting factors to the supply of meat on the markets.

The current marketing policy of the government is to liberalize the sale of livestock and meat through private parties in the local markets.

In line with this policy the recent consultancy report for NIB on LMB proposed the privatization of livestock marketing board in the report.

The stages would include a period of transformation, negotiation with donors for provision of experts, entering into joint ventures with international investors and selling of government shares to an international or local private investor.

Between the period of transformation and complete privatization of LMB, it is hoped that the physical facilites at the abattoir would be rehabiliated and ranches, feed mills and meat processing facilities established to create a better atmosphere for the local and export trade in livestock.

If the proposal is approved and the privatization programme implemented, better livestock markets, marketing facilities and pricing policy would be established to increase offtake by encouraging producers to place more animals on the market and thereby increasing the supply of meat.

It could be recommended that the future investors, the traditional dealers and the veterinary authorities should be incorporated into the future livestock marketing system in such a way that a favourable climate would be created for fostering both the local and export trade in livestock and livestock products.

[illegible]

ANNEXES

ABBREVIATIONS

L.M.B.	Livestock Marketing Board
N.I.B.	National Investment Board
M.I.D.	Maccarthy Island Division
U.R.D.	Upper River Division

LIST OF PERSONS MET

Mr. N'dong	Directorate Livestock Marketing Board
Mr. Alie Sarr	Directorate Central Statistics
Mr. Tunkara	Directorate Central Statistics

LIST OF DOCUMENTS

- International Meat Development Scheme, Report on a Mission to The Gambia. FAO August 1980.
- Proposals for Rehabilitation of the Abuko Abattoir. Overseas Development Administration, London. J.C. Barret 1981.
- Consultancy Report for National Investment Board on Livestock Marketing Board, February 1991.
- National Agricultural Sample Survey, 1989.

Currency equivalents - 100 Franc CFA [illegible] 04 Dalasis

The delayance in the conduction of the study is highly regretted. But it should be noted that the first twelve days (13th - 25th May), period during which the study was to be conducted, was spent going from office to office in order to secure the money to be spent on fuel

It was a frustrating experience considering the urgency and the magnitude of the work required.

My sincere thanks goes to Mr. Ken John who did everything possible to get the work started and Mr. Bocum for the sound advice during his visit.

Finally I would like to express my gratitude to all the CILLS experts for helping us to identify the constrains in the marketing circuits of livestock and livestock products.

TABLEAU NO. 1

EVOLUTION DE L'EFFECTIF DU CHEPTEL 1980 - 1990
(TETES) ET ESTIMATION DE SA PRODUCTIVITE EN 1990

ESPECE ANNEE	BOVINS	OVINS	CAPRINS	PORCINS	VOLAILLE
1980/81	PD	PD	PD	PD	PD
1981/82	---	---	---	---	---
1982/83	---	---	---	---	---
1983/84	---	---	---	---	---
1984/85	194,924	135,000	187,000	---	---
1985/86	290,000	175,000	194,000	12,000	345,000
1986/87	295,000	180.000	197,000	12,000	380,000
1987/88	305,000	180,000	204,000	13,000	418,000
1988/89	317,000	185,000	207,000	13,000	460,000
1989/90	327,000	190,000	250,000	14,000	506,000

Taux de croissance - 3 - 4%

Taux d'exploitation ou de commercialisation - 11.2%
Mode d'elevage (1) pour 1990
Transhumant -
Sedentaire -

Sources: - Department of Livestock Services.
- Department of Planning.
- Central Statistics Department

EXPORTATION DE VIANDE CONGELEE

PAYS LIBERIA ANNEE	QUANTITE (TONNES)	VALEUR (DALAS.)
1984	[illegible]	34,322.50
SIERRA LEONE 1984	[illegible]	63,920.35
SIERRA LEONE 1985	[illegible]	400,661.16

Source: Livestock Marketing [illegible] Files

TABLEAU NO. 12

EVOLUTION DES ABATTAGES CONTROLES PAR ESPECE A L'ABBATOIR D'ADUKO 1980 - 1990

ESPECE ANNEES	BOVIN	OVIN	CAPRIN	PORCIN
1980	3754	1278	2242	68
1981	4772	2606	5877	878
1982	9055	2476	5278	604
1983	9463	3510	6748	906
1984	13054	3205	8170	795
1985	15497	3235	5792	972
1986	10560	3271	4899	500
1987	8336	1497	3590	170
1988	9251	1064	3039	46
1989	11820	1309	2338	43
1990	12049	1237	2564	60

Source: Animal Health Division, Department of Livestock Services

Pourcentage des abattages controles par raport aux abattages totaux.

TABLEAU 13

EVOLUTION DU POIDS MAYEN DE LA CARCASSE PAR ESPECE 1980 - 1990 (KG)

ESPECE ANNEES	BOVIN	OVIN	CAPRIN
1980	PD	PD	PD
1981	120	---	---
1982	---	---	---
1983	129	10	---
1984	---	---	---
1985	105	PD	---
1986	DECEMBRE 120	PD	---
1987			
1988	PD	PD	---
1989	PD	PD	---
1990	PD	PD	---

PD - Pas Disponible
Les donnees sont ene=registrees a l;abbatoir d'Abuko
Source: Livestock Marketing Board.

TABLEAU NO. 17[a]

EVOLUTION DU PRIX MOYEN DE LA VIANDE PAR ESPECE
ET PAR CATEGORIE SUR L'AXE BANJUL - KOMBO DE 1980 A 1990
(DALASIS/KG)

ANNEES ESPECE ET	1981 URBAIN	1982 URBAIN	1983 URBAIN	1984 URBAIN
CATEGORIE	BANJUL ET KOMBO	BANJUL ET KOMBO	BANJUL ET KOMBO	BANJUL ET KOMBO
BOVINS Viande Sans as	D3.85/kg	D5/kg	D6.00/kg	D10.3/kg
Viande avec as	D2.75/kg	D3.25/kg	D4/kg	D5.2/kg
BOVINS Viande Sans as	PROVINCE D2.80/kg	PROVINCE D4.50/kg	PROVINCE D5.25/kg	PROVINCE D9/kg
Viande avec as	D1.75/kg	D2.75/kg	D3.25/kg	D4.2/kg

PRIX MOYEN DE LA VIANDE EN MILIEU RUBAIN DE 1987 A 1990

BOVINS	1987	1988	1989	1990 AVRIL	1990 AOUT	1990 DECEMBER
Viande avec as	D16.06/kg	D20/kg	D20/kg	D20/kg	D25/kg	D34.35/kg
					EN PROVINCE	
Viande avec as	---	---	---	---	D15/KG	
Viande avec as	---	---	---	---	D20/KG	

Source: - Livestock Marketing Board - 1981 - 1986
- Central Statistics Department 1987 - 1990

TABLEAU NO. 17b

PRIX MOYEN DE LA VIANDE DANS LES VILLES DE BANJUL, BRIKAMA, FARAFENNI ET BASSE 1990

1990	VIANDE AVEC AS			
MOIS	BANJUL	BRIKAMA	FARAFENNI	BASSE
MAI	D19.33/kg	---	D15/kg	15.33/kg
JUIN	D24	D19.16	D15	D15.67
JUILLET	D23.67	D28.75	D15	D16
AOUT	D20	D20.33	D15	15.34
SEPTEMBRE	D20	D17.50	D15	12.80
OCTOBRE	D20	D17.84	D15	D17.12
NOVEMBRE	D20	D17.84	D15	D16.19
DECEMBRE	D20	D17.67	D15	17.91
MOYEN	D20.88	D22.35	D15	D15.80

Source: - National Agricultural Data Centre NADC/DOP

TABLEAU NO. 18

PRIX MOYEN A L'EXPORTATION DES CUIRS ET PEAUX EN 1990

CATEGORIE	PRIX D'ACHAT	PRIX A L'EXPORTATION
Cuirs premiere qualite	D15	D37.50
Peaux premiere qualite	D5	D15
Cuirs deuxieme qualite	D10	D15
Peaux deuxieme qualite	D3.50	D5

Source: Gambia Tannery - GAMTAN

TABLEAU NO. 19

PRIX DU LAIT A L'IMPORTATION ET A LA CONSOMMATION EN 1990

	A L'IMPORTATION	AU DETAIL
- Lait en poudre	24 x 400 g - D450 12 x 900 g - D450	D19.50 D39.50
- Lait condense (Peak)	boite de 6oz - D2.50	D3.00

Source: National Trading Corporation (NTC)

TABLEAU NO 20

EVOLUTION DU PRIX DU MIL ET DU MAIS AU DETAIL DE 1980 A 1990

PRIX DU MIL

ANNEE MIL	1987	1988	1989	1990 1	1990 2	1990 3
Prix par kg	D2.46	D2.28	D3.06	D3.30	D3.30	D3.30

Source: Central Statistics Department

PRIX DU MAIS ET DU MIL EN 1989/90

MOIS	MAIS AU DETAIL	AU MARCHE HEBDOMADAIRE	MIL AU DETAIL	AU MARCHE HEBDOMADAIRE
AOUT 1989	D3.13	D1.55	D2.88	D1.74
SEPT. 1989	D2.97	D1.30	D3.08	D1.50
OCT. 1989	D1.63	D1.21	D1.96	D1.41
NOV. 1989	D2.33	D1.48	D2.06	D1.38
DEC. 1989	D2.33	D1.54	D2.06	D1.53
JAN. 1990	D2.28	D1.70	D2.16	D1.77
FEV. 1990	DS.41	D1.82	D2.16	D1.99
JUL. 1990	D2.71	D1.79	D2.33	D1.83
AOUT 1990	D2.71	D2.65	D2.62	D2.29
SEPT. 1990	D3.50	D2.66	D2.50	D1.91
OCT. 1990	D2.38	D1.86	D2.17	D1.85
NOV. 1990	D2.29	D1.88	D2.21	D1.50
DEC. 1990	D3.00	D2.25	D2.96	D1.92
MOYEN	D2.70	D2.14	D2.32	D1.90

Source: National Agricultural Data Centre NADC/DOP.

[illegible]

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