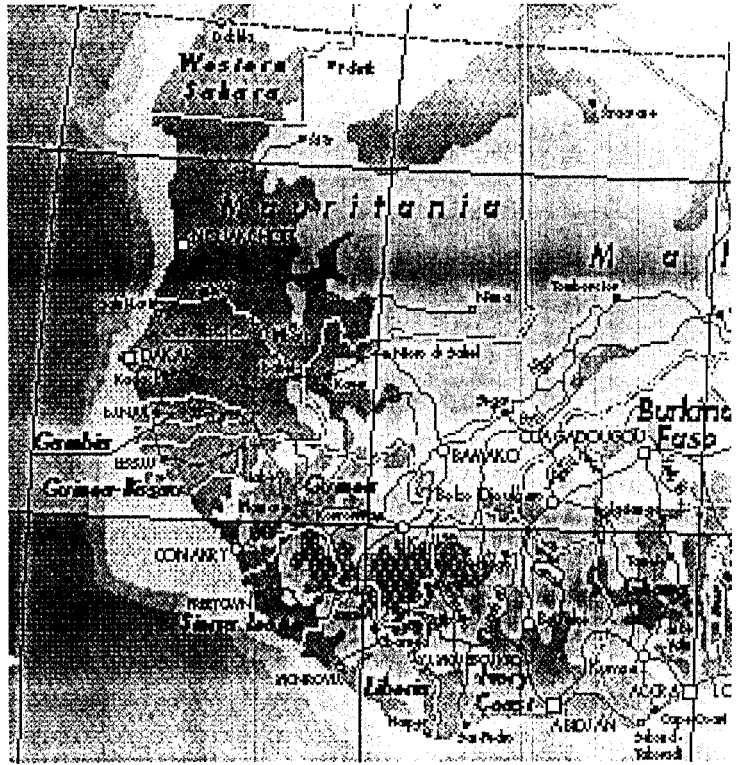


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COUNTRY

SENEGALESE POULTRY INDUSTRY EXPANDS WITH VARIOUS BOTTLENECKS



Since Senegal **became** independent in **1960**, the poultry industry has become an important source of animal **protein** for the **Senegalese population**. The industry has opportunities, to grow further, but it first **has** to remove major bottlenecks.

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Eratic rainfall over the last 29 years has caused Senegal, like many Sahelian countries, to experience a drastic decrease in agricultural and animal production. In the wake of the resulting animal protein deficit, the Senegalese government supported poultry production development in hopes of providing the population with nutritious and affordable animal products. As a result of that support, the poultry industry's modern sector has grown rapidly to become an important protein source for consumers, as well as a substantial source of income for poultry keepers. Despite this early boom, however, the poultry industry still faces a variety of bottlenecks.

Industry development

Commercial poultry farming was introduced to Senegal by

Europeans following the nation's independence in 1960. Today, the commercial poultry sector constitutes about 30 percent of total national poultry stock and is mainly controlled by active and retired state employees.

In 1960, the national poultry flock was estimated at 381,000 birds but, from 1960 to today, the flock showed an average growth rate of about 19 percent. This expansion can be subdivided into two periods. The first period, from 1960 to 1980, was characterized by an extremely high growth rate of over 23 percent; the second period, from 1980 to 1985, was characterized by a low growth rate of about 3 percent. Since 1985, however, there has been a higher positive trend of about 17 percent.

The low growth rate of the second period was caused by a devastating drought in 1983. The

poultry industry was influenced by the drought in two ways: 1) it caused a drastic lack of feed supply for poultry and 2) beef, mutton and goat prices dropped considerably. As a result of lower red meat prices, consumers bought more of these meats and far less poultry. Further, the drought affected the broiler industry more than the egg industry because farmers reacted quickly and stopped meat

production. Despite the devastation of the drought, the situation rapidly stabilized in the following years.

Consumption

According to the FAO's (Food and Agriculture Organisation) estimation, the Senegalese population's consumption of poultry products is increasing.

FREQUENCY OF TECHNICAL PRODUCTION PARAMETERS OF BROILER FARMS IN THE REGIONS OF DAKAR AND THIES

Principal parameters	Importance of poultry flocks		
	< 500	500 - 5000 Percent	> 5000
Chicks mortality of the			
0-1 %	100	0	0
1-2 %	0	100	100
Mortality during the			
2-7 %	73	70	100
7-10 %	27	30	0
Age at the time of sale:			
40 - 50 days	33	60	50
51 - 70 days	67	40	50
Average live weight at			
1.2 - 1.7 kg	33	70	50
1.8 - 2.0 kg	67	30	50
Feed conversion*			
2-3	43	78	100
> 3	57	22	0

*: kg feed per kg live weight



"Complexe avicole de M'Bao", near Dakar, which provides poultry farmers with day-old chicks, feeds, feed additives, equipments and consulting



"Sénégalaise de Distribution de Matériel Avicole" (SEDIMA) for supplies poultry farmers with day-old chicks, feeds and equipments

The per capita egg consumption increased from 1.14kg in 1985 to 2.4 kg in recent years. Likewise, per capita poultry meat consumption jumped from 2.96 kg in 1985 to over 5.8 kg. This represents an consumption increase of 107 percent for eggs and 95 percent for poultry meat.

Despite this positive trend, the consumption of poultry products is still considered low when compared with consumption of other meat (10 kg) and fish (30 kg). Since Senegalese consumers do not generally own freezers in which to store meat, they often purchase living birds and slaughter them at home.

Since cost surely plays a part in a consumer's decision to buy chicken meat, it is important that the industry remain competitive. The average chicken meat prices vary from about 1,300 to 1,500

CFA francs (US\$ 2.70 to 3.201 per kg. This is about 25 percent less than those of mutton and beef.

One chicken egg costs about 60 to 65 CFA francs (US\$ 0.13 to 0.14) and a 30-egg crate about 1,300 to 1,500 CFA francs (US\$ 2.7 to 3.2).

Another factor to consider is, though chicken meat is priced competitively, the average yearly income of a Senegalese is only about US\$ 600-650.

Consequently a large majority of Senegalese consumers can rarely afford to regularly buy poultry products for their nutrition. Although chicken meat is highly appreciated by the Senegalese population, most only consume poultry meat on occasions of ritual or religious ceremonies. It is therefore assumed that consumption will go up as soon there is a rise in income.

Commercial poultry production

Senegal's commercial poultry production is based on relatively modern techniques. Factors which may contribute to further development include implementation of co-operatives and direct flights from Europe which make regular imports of feed additives and veterinary products possible. Locally available, high-quality feedstuffs also help to develop the Senegalese poultry industry.

In spite of these advantages, the Senegalese commercial poultry production is beset with many difficulties. In the late 1980s, dwindling poultry unit numbers could partially be blamed on cheap chicken meat imports (mainly from Europe) saturating the market. The lower priced imported chicken meat forced many farms to switch their focus to table egg production, which resulted in a trend away from single bird-type farms to mixed bird units. About 13 percent of layer farms and 18 percent of broiler farms today only operate during exceptional markets prior to religious feasts.

Poor conditions

Most modern broiler farmers raise six flocks per annum in, usually, poorly ventilated houses where hygiene is not a main concern. Such poor conditions cause a high incidence of infectious disease (e.g. coccidiosis, Newcastle disease and Gumboro). This is especially the case in broiler farms with small flocks. Studies show a positive correlation between the size and obtained performance of broiler farms (Table 1). Generally,

BOTTLENECKS

The Senegalese poultry industry is faced with various bottlenecks, including the following:

- poultry farming is generally considered a source of additional income, not as a full-time occupation
 - bad design of poultry houses, which contributes to insufficient hygiene conditions
 - high prices of imported hybrid lines (broilers and layers), particularly after the 50 percent devaluation of the CFA franc in January of 1994
 - high prices for commercial feedstuffs, especially, during periods of feed shortage
 - low knowledge of poultry farmers, largely responsible for modest performances
 - * non-existence of technical training for farmers, especially in order to improve the quality of feeds produced within the farms
 - bad adaptation of production's rhythm to the market and periodic pressures from competition with other types of meat e.g. after a period of drought
 - * pressure of competition with various cheap imported poultry products (eggs and meat)
- Poultry farmers must overcome these difficulties in order to improve their situation. Furthermore, the Senegalese government must exert, immediately and definitively, strong controls or bans over all imports of poultry products. □

husbandry techniques on large farms are better than those practised on small-sized farms.

Both small and large farms share one mutual problem. During times of feed shortage, all poultry producers are confronted with severe difficulties. For example, a cereal shortage in February 1989 caused cereal prices to climb dramatically (11 percent for maize, 26 percent for millets and 10 percent for sorghum grains). Consequently, poultry feedstuffs also became more expensive and poultry farmers had two options: raise prices of their products (not favourable for consumers) or maintain prices of their products at previous levels (low net profit and loss for poultry farmers). As a result, the Senegalese poultry industry slowed down its growth

WHO ARE POULTRY FARMERS

The socio-professional profile of Senegalese poultry owners (in the regions of Dakar and Thiès) shows that state employees in active life predominate on large farms and less than 10 percent of poultry units are managed by full-time poultry farmers. The vast majority of farms are owned by high officers and wealthy people who use poultry farming only for supplementary income. Similar circumstances are found in neighbouring countries such as Mali, Burkina Faso and Niger. □

Socio-professional category	Size of flocks		
	< 500	500 - 5000	> 5000
	Percent		
State employees in active life	34	27	100
Retired state employees	33	18	0
Poultry farmer (full-time)	0	27	0
Businessman	33	0	0
Farmer	0	10	0
Other professions	0	18	0
Total		100	