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FARMERS CHOICE LTD**

African Swine Fever Private Sector Perspective (Eastern Africa)



**Regional training course (Africa)
Import risk analysis for African swine fever
9 November – 14 December 2021**



**Organisation
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Animale**

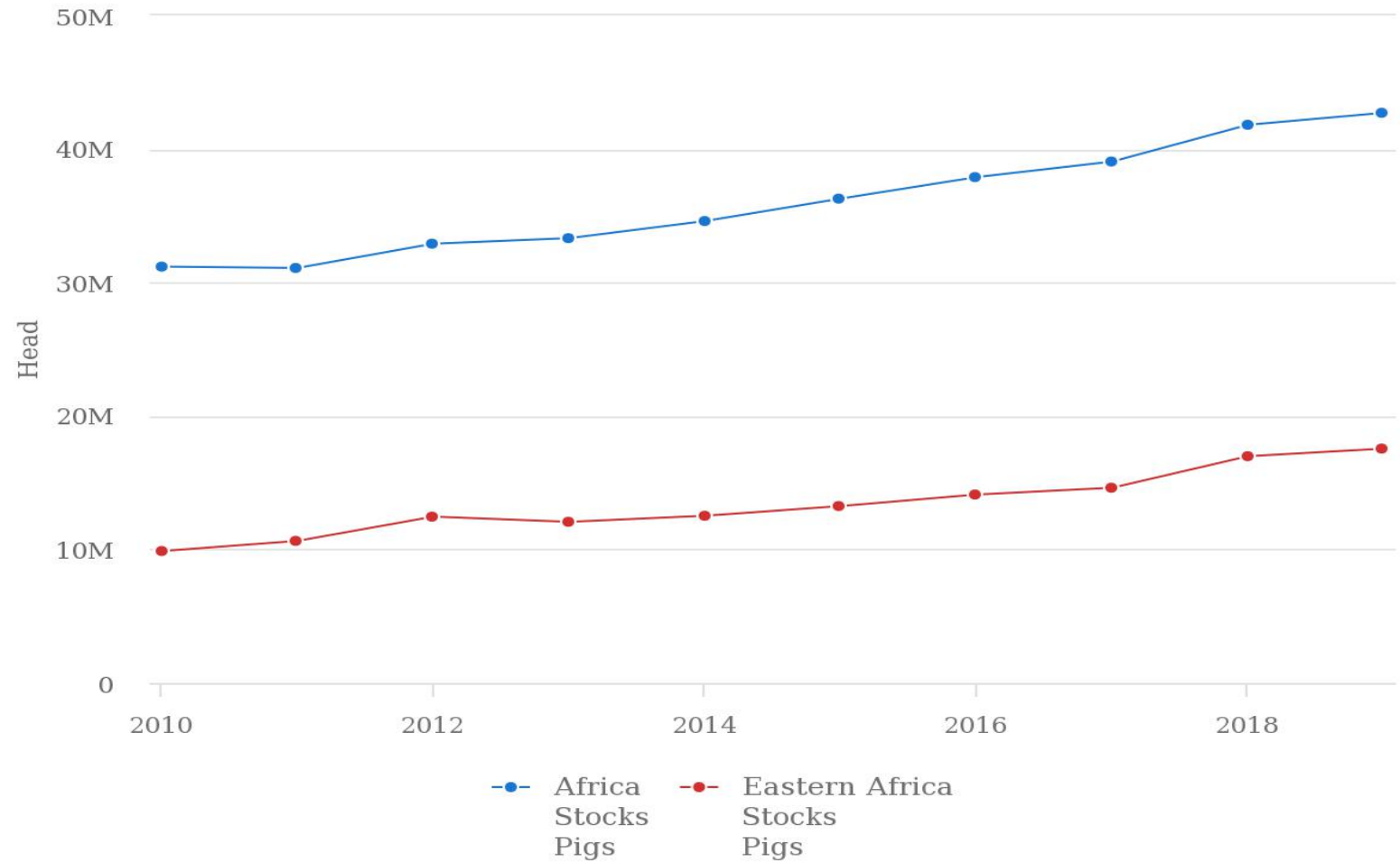
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- ASF endemic in Eastern Africa – frequent outbreaks.
- Pig populations and pork consumption increasing and projected to increase by > 200% between 2010 – 2050 (FAO)
- Main production system in the region = small holder \geq 75%
 - Worst affected by ASF outbreaks
 - Market Disruptions

Pig Population – Africa Vs Eastern Africa



Source: FAOSTAT (Nov 06, 2021)

■ Pork Market Overview

- Nigeria, South Africa and Malawi – highest volumes of pork production at approximately 270K, 250K and 127K tonnes respectively
 - 46% of total production in Africa
- Pork market value = approximately USD 10 billion.
- 28 million head slaughtered in 2015 with +5% annual increase projected.
- Few processing industries - Only about 5 - 10% of the total meat is processed compared to 60% in the developed world.
- Consumption – Nigeria, SA, Angola largest consumers – 45%. Malawi, UG, Mozambique, Madagascar, DRC, Burkina Faso, Cameroon, Cote d'Ivoire, Zambia, Ghana = 40%
- Highest per capita consumption; Malawi – 7.25kg, SA – 6.8kg, Angola - 5.7kg, UG – 3.4kg.

Source – IndexBox

Pork Production Compared to Other Species - Eastern Africa

COUNTRY	Total Meat production (All species, Tonnes)	Proportionate (%) contribution of each species to total meat production (2015 -2019 average)					
		Chicken	Cattle	Goat	Pig	Sheep	Camel
Burundi	426,314	16	35	22	25	2	-
Ethiopia	684,811	10	50	12	0.3	13	4
Kenya	750,756	10	63	6	2	4	10
Rwanda	105,023	17	31	19	12	5	-
Uganda	413,544	16	42	9	31	2	-
Tanzania	562,938	14	68	7	3	4	-

Kenya - per capita meat consumption; Beef – 12.2kg, Shoats – 2.2kg, poultry – 0.6kg, pork 0.4kg (UG – 3.4kg, SA – 6.8kg). *Source - FAO*

The meaty numbers

14kg

per person a year was the meat consumption in Kenya in 2013, 29g less than at independence

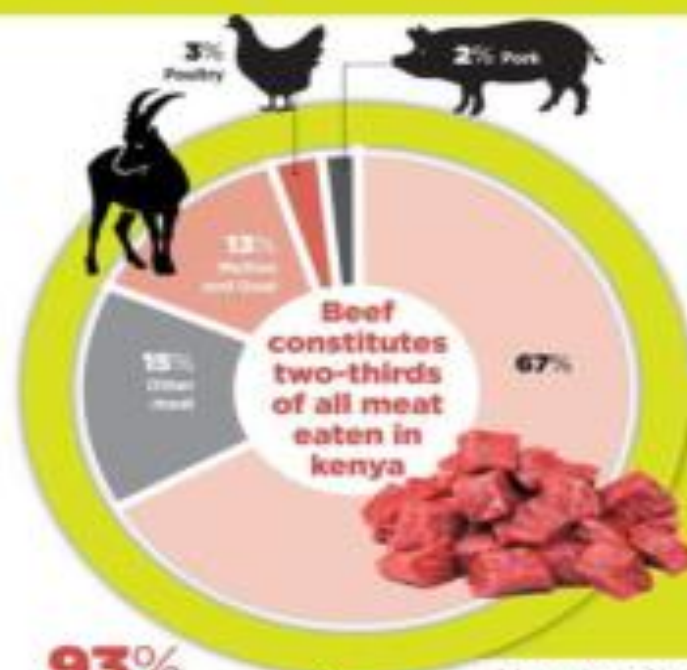


19kg

Average meat consumption per person a year in Africa in 2013, higher than Kenya's

5X

The increase in meat consumption required for Kenyans to meet their protein needs in the absence of other major alternative sources of protein



Across the world

86kg

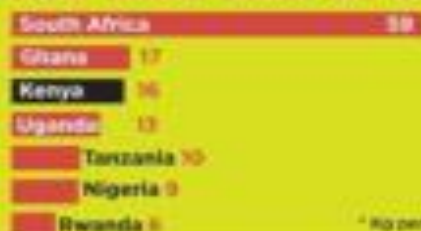
Meat consumption in the Americas per person a year which is 5 times as much as Africa's while Europe's is 4 times as much (76kg) and Asia's is almost twice as much (31kg)

Production

9.1m

Livestock sold to abattoirs in 2015 in Kenya, an increase of 12% from 2011 when 8.2 million were sold

How much other Africans eat



93%

Increase in pork consumption per person in Kenya in the 50 years to 2013



Money and meat

3X

more meat is eaten by the super rich compared to the poorest Kenyans

56%

Increase in the price of goat meat in Kiserian and Kaisaris areas in Kajiado County by mid-December 2016 when it sold for Sh7,000 compared to Sh4,500 in April this year.

12%

Contribution of the livestock sector to Kenya's Gross Domestic Product

19%

Volume of greenhouse gas emissions attributed to agriculture especially meat and dairy production

Imports

- Genetics
 - Live animals
 - Semen
- >250K tonnes of pork imported throughout Africa. Angola, SA, DRC, Ivory Coast represent 2/3 of total imports.
- Imports comprise of;
 - Frozen pig meat other than cuts or carcasses – 88%
 - Frozen hams, shoulders and cuts – 6%
 - Frozen carcasses
 - Fresh or chilled pig meat

Exports

- >30K tonnes exported. SA dominates exports > 10K tonnes = 86% followed by Kenya- $\geq 2k$ tonnes = 10% and Angola.
- Exports by type;
 - Processed products
 - Frozen pig meat
 - Fresh or chilled meat
 - Fresh carcasses

FCL EXPORT VOLUMES	
2020	
COUNTRY	ACTUAL VOLUME (kgs)
	Jan-Dec 2020
TANZANIA	685,786
UGANDA	669,281
RWANDA	32,825
S. SUDAN	41,954
SOMALIA	18,023
U.A.E.	356,423
OMAN	1,300
BAHRAIN	46,501
SEYCHELLES	36,828
ETHIOPIA	14,657
GHANA	5,547
NIGERIA	3,310
OTHERS	13,867
TOTAL (kgs):	1,926,302

Challenges

- Closed borders due to disease status.
- High production costs (high feed costs) thus lack of competitiveness.
- Non tariff barriers.
- Low yield (genetics) – average yield approximately 50kg
- Market inefficiencies – shortages, no value addition
- Non/prohibitive policies
- Lack of finances - Financial institutions geared to lending for fixed capital needs while agro-industries, have a large requirement for working capital.
- Limited knowledge/technical knowhow

Future Opportunities for Trade

- Pork consumption in Africa will increase by 3.3% annually up to year 2050.
- What will drive Industry growth? (Opportunities)
 - Resource & labor availability
 - Technology
 - Consumer needs
 - Infrastructure availability
 - Equipment
 - Input supply - Transport
 - Processing - Distribution
 - Education/Training



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