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FARMERS CHOICE LTD

An Overview of Value Chains Associated with Swine Production and Marketing – Eastern Africa

Regional training course (Africa)
Import risk analysis for African swine fever
9 November – 14 December 2021
There are 18 countries and 2 dependencies in East Africa.

Seven of East Africa’s countries are landlocked countries.

Most populous sub region of Africa; Population – 455 million

70% of the population live in rural areas.

East Africa has some of the world's fastest growing economies, including Ethiopia, Rwanda, Tanzania and South Sudan.
Demographics of Pig Production in Eastern Africa

- Pig production is a dynamic and rapidly growing sector in the region.
- Growth is driven by a rising demand for pork and pork products.
- Recent estimates indicate that demand for pork and poultry products in East Africa will increase 4-fold by 2030.
  - Changing tastes
    - Increasing human population
    - Increased incomes
    - Urbanisation
- Small scale pig farming is the predominant production system > 70%, across the region but it’s contribution to improving livelihoods and enhancing food security is limited by frequent disease outbreaks.
- Breeds kept – indigenous, Exotic or crosses of the two
Breeds - Maternal Lines

- Traits
  - Prolificacy
  - Efficiency
  - Robustness
  - Conformation
  - Longevity
  - Temperament
  - Mothering ability
  - High health status
  - Disease resistance
Terminal Lines

- **Traits**
  - Growth rates,
  - Feed intake & FCE
  - ADG
  - High kill out % and carcass yields
  - Maximum hybrid vigor
  - Disease resistance
  - Robustness
  - Hardy
  - High health status
Eastern Africa Pig Population

Source: FAOSTAT (Nov 21, 2021)
<table>
<thead>
<tr>
<th>Area</th>
<th>Item</th>
<th>Element</th>
<th>Year</th>
<th>Value</th>
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<td>COUNTRY</td>
<td>Total meat production (all species, Tonnes)</td>
<td>Proportionate (%) contribution of each species to total meat production (2015 - 2019 average)</td>
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<td></td>
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<td>Chicken</td>
<td>Cattle</td>
<td>Goat</td>
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<td></td>
<td>Thousand tonnes</td>
<td>% change</td>
<td>Annual Growth rates</td>
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<tr>
<td></td>
<td>2010</td>
<td>2030</td>
<td>2050</td>
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<tr>
<td>Beef</td>
<td>467</td>
<td>734</td>
<td>1277</td>
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<td>Poultry</td>
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<td>7513</td>
<td>13298</td>
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<td>Mutton &amp; goat</td>
<td>87</td>
<td>103</td>
<td>127</td>
<td>46%</td>
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<tr>
<td>Pork</td>
<td>13</td>
<td>29</td>
<td>48</td>
<td>268%</td>
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The Pork Value Chain in Eastern Africa

INPUT SUPPLY
- Live pigs
- Feed, water
- Vet. and lab Services
- Extension

PRODUCTION
- Feeding
- Mgt. of the animal

MARKETING
- Buying (traders, marketing groups)
- Transporting

PROCESSING
- Slaughtering
- Chilling
- Value addition
- Packing
- Distribution

CONSUMPTION
- Domestic
- Export
Pig Production Systems

- Free range/Extensive
- Small – Medium Scale/Semi – Intensive
- Large Scale/Intensive systems
Production Practices Associated with each System

Production Factors

Animal
- Genetics

Environment
- Farm
- Housing
- Equipment

Management
- Husbandry
- Nutrition
- Health
1. Free Range (Backyard)/Extensive

- Less than 10 pigs
- Pigs left to roam freely and in some cases are housed in the evenings.
  - Owners don’t own land
- Poor access to Veterinary, Extension, financial and market information services.
- Poor husbandry and health management practices.
- Poor genetics characterised by inbreeding, absence of appropriate breeding strategies.
- Breeding stock/pigs sourced from neighbours.
- Feed options – scavenging from dumpsites, swill, kitchen leftovers, market spoils.
- Market weight is low and pigs take long to attain this >10 months
- Low input and gain
- High sales occur mostly during festivities or disease outbreaks
2. Small – Medium Scale/Semi – Intensive

- 5 – 500 sows.
- Improved genetics, sourced from private and government institutions and sometimes from neighbours.
- Use of communal boars. A.I in some cases
- Feed – commercial supplemented with swill/kitchen waste whilst others do their own mix.
- Improved husbandry practices coupled with access to Veterinary and extension services.
- Housing provided – Semi permanent or permanent using locally available materials.
- Majority are farrow to finish units with a small percentage selling off weaners.
- Improved access to markets and market information.
- Higher market weights at a younger age.
- Better biosecurity knowledge and implementation.
3. Large Scale/Intensive Systems

- > 500 sows
- World class genetics often imported from Europe with breeding strategies in place.
- High investments - Modern housing, management, labour, piped & treated water, biosecurity and better gains.
- Vertical integration common.
- A.I favoured over natural mating.
- Feeds – High quality commercial feeds, suited to the different classes of pigs.
- Access to good veterinary services coupled with high biosecurity leads to low diseases burden and mortality.
- High market weight at a young age < 6 months.
- Structured and better market access.
- Examples – Farmers Choice Ltd – Kenya, Breeds, Feeds and Meats – Uganda
Farmers Choice Ltd

Feed Mill
- 25,000T PA

FCL Pigs
- 25%

3rd Party Pigs
- 75%

Processing Plant

Choice Meats Cattle
- 25,000 PA

Domestic Market
- 80%

Export Market
- 20%
Trade and Marketing Practices Associated with each System

1. Free Range/Extensive System

- Butchers and traders move from homestead to homestead and village to village – fattening &/or slaughter.
- Transport modes – pick – ups, saloon cars, boda bodas, bicycles.
- Local slaughter – small to medium size slaughter houses, slaughter slab.
- Consumption mostly local – pork joints, butchers.
Transport Modes

Photos courtesy – World Animal Protection
2. Small – Medium Scale/Semi - Intensive System

- Farmers sell directly to slaughter houses or to butchers & traders. May be contracted.
- Higher number of pigs sourced from one farm.
- Medium – large size slaughter houses or own slaughter slabs.  
  - Lairage  - running water  - Chillers/Cold rooms  - Meat inspection  
  - Stunning and bleeding area  - Waste management  - Trained personnel
- Transport better organised – Pick ups, trucks.
- Consumption – local butchers, pork joints, further processing.
Large Scale/Intensive Systems

- Produce high numbers.
- Deal with medium - large scale slaughterhouses.
- Payment done on cold dressed weight after slaughter.
- Welfare friendly transport, mostly trucks.
- Value addition – Fresh and processed products.
- Market – High end retailers (hotels, restaurants, supermarkets), export.
References

- Dione et al 2016: Qualitative Analysis of the risks and practices associated with the spread of ASF within the small holder pig value chains in Uganda.
- Lichoti et al 2017: Pig Traders’ Networks on the Kenya Uganda border highlight potential for mitigation of African Swine Fever virus transmission and improved ASF disease risk management
- Yamo 2021 – Animal welfare in pig production.