



# AFRICA

Brief market overview: poultry meat & eggs





# Africa

## INHOUD

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# GENERAL INFORMATION

Africa is the world's second-largest and second-most-populous continent. At about 30.3 million km<sup>2</sup> (11.7 million square miles) including adjacent islands, it covers six percent of Earth's total surface area and 20.4 percent of its total land area. With 1.1 billion people as of 2013, it accounts for about 15% of the world's human population. The continent is surrounded by the Mediterranean Sea to the north, both the Suez Canal and the Red Sea along the Sinai Peninsula to the northeast, the Indian Ocean to the southeast, and the

Atlantic Ocean to the west. The continent includes Madagascar and various archipelagos. It contains 54 fully recognized sovereign states (countries), nine territories and two de facto independent states with limited or no recognition.

Africa's population is the youngest amongst all the continents, the median age in 2012 was 19.7, when the world-wide median age was 30.4. Algeria is Africa's largest country by area, and Nigeria by population. (source Wikipedia)



The continent of Africa has recorded substantial growth in poultry production since 2000, with South Africa being one of the most important players in the region, writes industry analyst Terry Evans.

Regarding chicken meat production, Africa currently produces around 5 million tonnes a year or some 5 per cent of an estimated world output of 99 million tonnes (Table 1).

In terms of numbers, almost 1,300 million people have to be fed there today and even by 2030 the increase will be in the order of almost 500 million.

**Table 1** Indigenous\* chicken meat production (million tonnes)

REGION	2000	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014E	2015F
Africa	2.8	3.3	3.4	3.7	4.0	4.2	4.5	4.5	4.6	4.7	4.9	4.9
Americas	27.1	32.7	33.7	35.0	37.5	36.9	38.8	40.0	40.5	42.1	42.8	43.4
Asia	18.6	22.4	23.5	25.0	26.2	28.0	29.2	30.3	31.6	32.2	32.1	32.7
Europe	9.5	10.9	10.8	11.6	12.1	13.3	13.9	14.6	15.5	16.1	16.5	16.7
Oceania	0.7	0.9	1.0	1.0	1.0	1.0	1.1	1.2	1.2	1.3	1.2	1.3
WORLD	58.7	70.3	72.3	76.2	80.7	83.4	87.4	90.6	93.3	96.3	97.5	99.0
<b>BROILER MEAT PRODUCTION (MILLION TONNES)</b>												
WORLD	50.1	63.1	64.3	68.3	72.8	73.6	78.2	81.4	83.4	84.6	86.4	87.3

\*Meat from the slaughter of birds originating in a country, plus the meat equivalent of any such birds exported live.

E 2014 and F 2015 author's estimates and forecasts for chicken meat, F 2015 USDA forecast for broiler meat.

Regional figures may not add up to the world totals due to rounding.

Source: FAO for chicken meat, USDA for broiler meat





# MEAT PRODUCTION AND CONSUMPTION

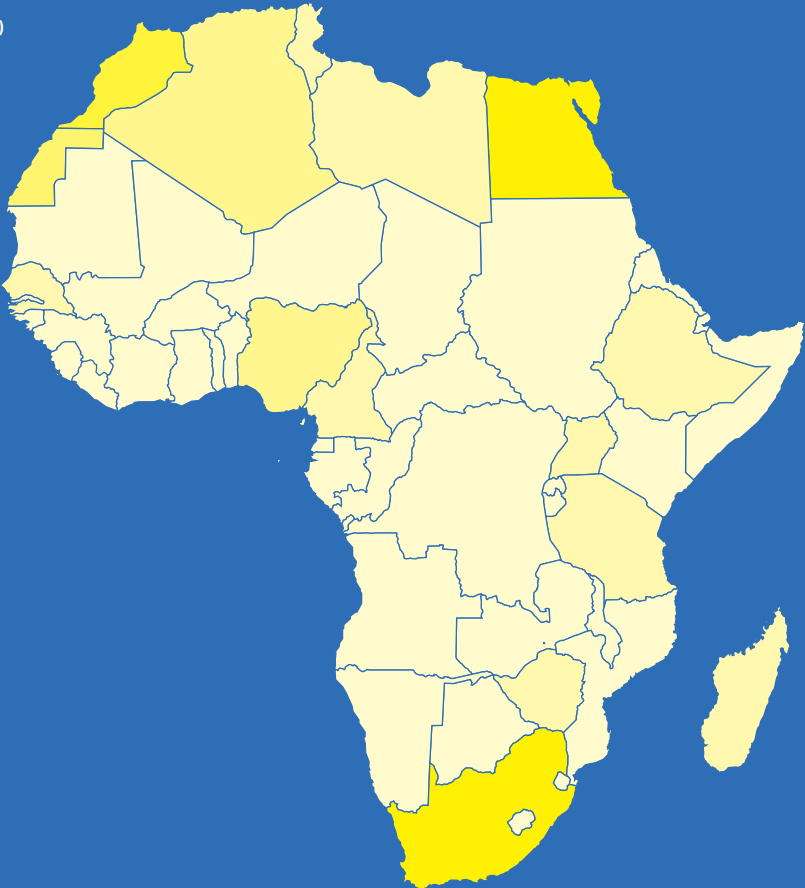
Over the period 2000 to 2013, which is the last year for official data from the Food and Agriculture Organisation (FAO), the production in Africa of chicken meat, table birds plus culled layers, expanded by a little over 4 per cent per year compared with a global figure of just under 4 per cent.

Consequently, Africa's share of the world total has improved a little from 4.7 to 4.9 per cent. Incidentally, for the same period the USDA, which makes assessments of global broiler production, calculates a growth rate of 4.1 per cent as output has climbed from 50.1 million tonnes to 84.6 million tonnes (Table 1).

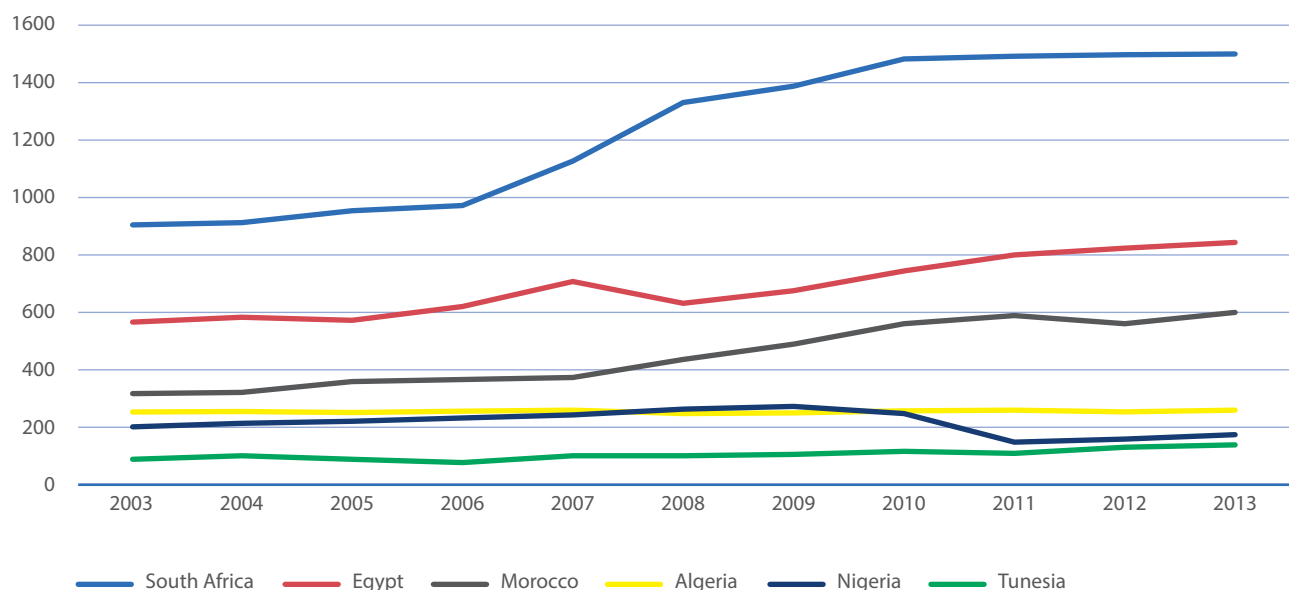
Long-term forecasts for poultry meat production point to an annual growth of less than 2.5 per cent as the total amounts to around 134.5 million tonnes by 2023. As chicken meat represents around 88 per cent of poultry meat output, chicken production is likely to exceed 118 million tonnes at that time, with Africa supplying around 6 million tonnes.

Chicken meat production in Africa increased by almost 2 million tonnes between 2000 and 2013 with all but a handful of countries recording substantial growth (Table 2 added at the end of the document).

Chicken meat production per country as of 2013 ('000 tons)  
The more blue the more tonnes (derived from table 2)



**Figure 1** South Africa and Egypt head the group of leading producers in the region ('000 tonnes)



South African Poultry Association (SAPA) figures, which apply to commercial and subsistence chicken production, show a similar trend though at the higher level of 1.7 million tonnes for the latter years.

Another series, compiled by the USDA on broiler production in South Africa for the period 2013 up to and including 2015, shows little change around an annual figure of 1.4 million tonnes.

While the demand for chicken continues to outstrip supply, South African producers are having to face increased competition from imports. Indeed, the Association foresees ongoing battles against unfair trade practices as being one of the major challenges to industry growth. Nevertheless, it is anticipated that production could reach 1.8 million tonnes in the next decade.

Egypt is the second largest producer having managed a near 4 per cent per year growth rate between 2000 and 2013 as annual output expanded from 512,000 to 834,000 tonnes.

Among the largest producers, Morocco has recorded the most rapid increase since 2000, averaging over 7 per cent per year, as production more than doubled from 238,000 tonnes to 599,000 tonnes.

Although Algeria is among the leading producers, actual output has changed little over the past decade or so at around 250,000 tonnes.

Having expanded from 159,000 tonnes in 2000 to 273,000 tonnes in 2009, Nigeria's industry almost collapsed to 145,000 tonnes in 2011. Since then a slow recovery has ensued with output reaching 170,000 tonnes in 2013.

Chicken production in Tunisia has expanded by 3.8 per cent per year to a record high of 139,000 tonnes in 2013.

A moderate 2 per cent per year increase has pushed Libya's output to 125,000 tonnes. Of note is that quite a number of the smaller nations managed to more than double production during the review period.



## Africa's imports will continue to grow

World trade in frozen/fresh chicken meat almost doubled between 2000 and 2012 when it totalled 12.6 million tonnes (Table 3). In recent years however, global trade has slowed and appears to have even contracted in 2015, though forecasts point to a recovery in 2016.

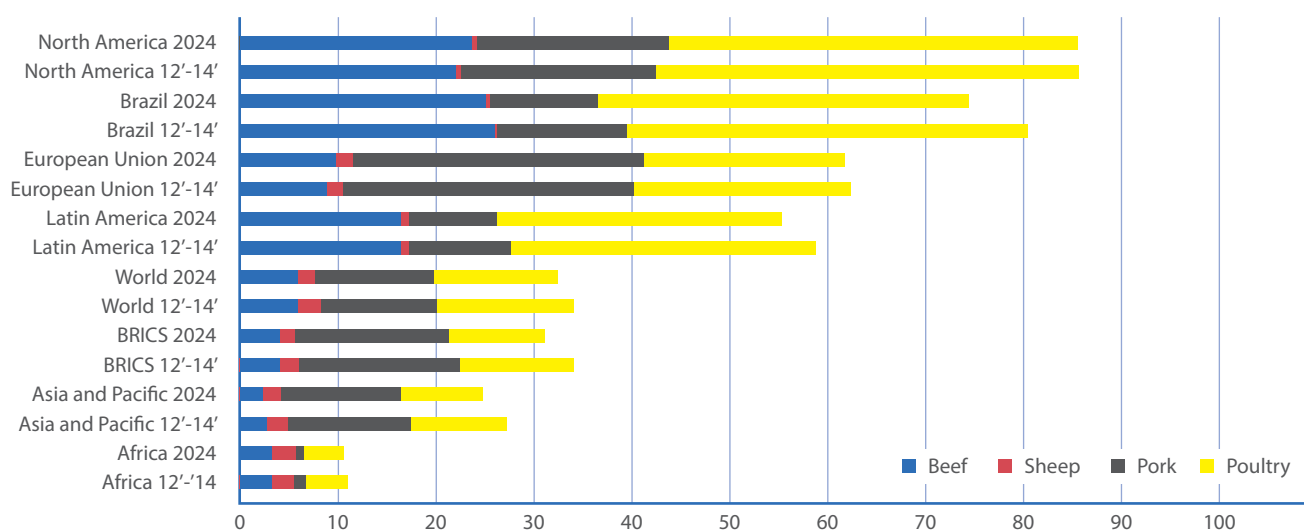
**Table 2** World trade in fresh/frozen chicken meat ('000 tonnes)

Source: FAO

EXPORTS	2000	2005	2008	2009	2010	2011	2012
Africa	9.5	4.8	9.5	46.3	61.5	14.4	14.3
Americas	3627.4	5517.2	7311.6	7235.3	7260.7	7539.5	7733.0
Asia	1432.2	420.6	765.8	876.5	1188.0	1373.1	1287.4
Europe	1805.1	2137.3	2344.7	2592.1	3115.7	3477.8	3547.9
Oceania	14.3	21.8	31.0	33.3	29.2	32.8	39.4
WORLD	6888.4	8101.7	10462.6	10783.5	11655.1	12437.6	12621.9
IMPORTS							
Africa	259.0	512.9	718.2	861.2	1069.0	1283.4	1550.4
Americas	556.0	912.2	1375.6	1384.4	1493.8	1505.2	1584.9
Asia	3276.7	2767.2	4274.9	4650.3	5021.5	5780.0	5328.6
Europe	1811.2	3223.6	3374.2	3095.0	2879.7	2790.3	3029.9
Oceania	26.4	35.5	38.1	44.0	48.8	59.2	66.4
WORLD	5929.3	7451.4	9781.0	10035.5	10512.8	11418.1	11560.1

**Figure 2** Meat consumption worldwide

Source: OECD/Food organization of the United Nations 2015



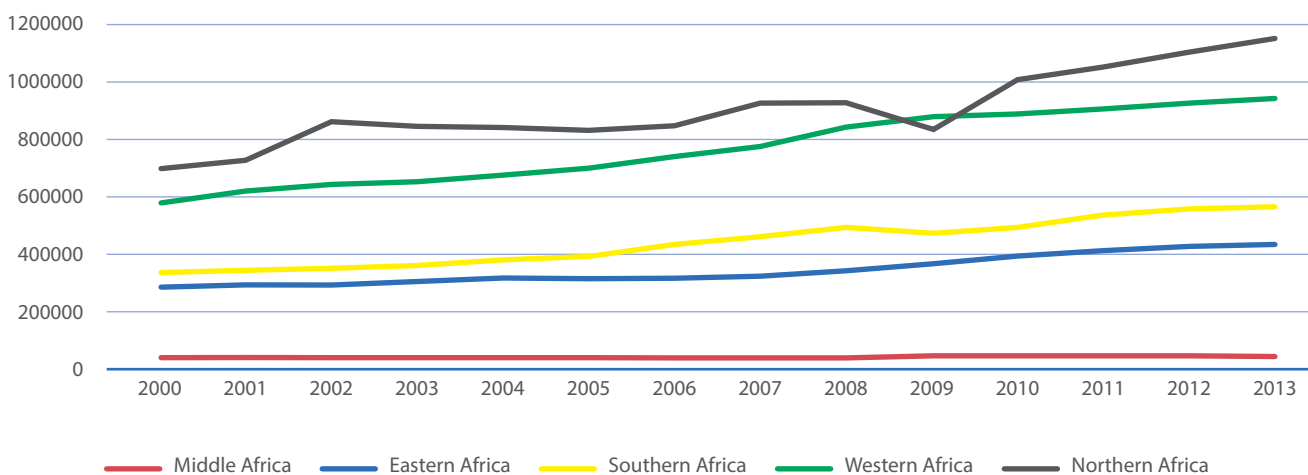
# EGG PRODUCTION AND CONSUMPTION

Between 1990 and 2008, egg production in Africa increased from 1.5 million tonnes to 2.4 million tonnes or by 58.1 %. This growth was mainly a result of the development in Northern, Southern and Western Africa, as can be seen from table 1 and figure 2. In Western Africa the production

volume increased by 320,000 tonnes or 70.3 %, in Southern Africa by 280,000 tonnes or 128.1 % and in Northern Africa by 250,000 tonnes or 43.9 %. In the two other sub-regions, Eastern and Middle Africa, the absolute and relative growth rates were considerably lower.

**Figure 3** The development of egg production in the sub-regions of Africa (tonnes)

Source: FAO database

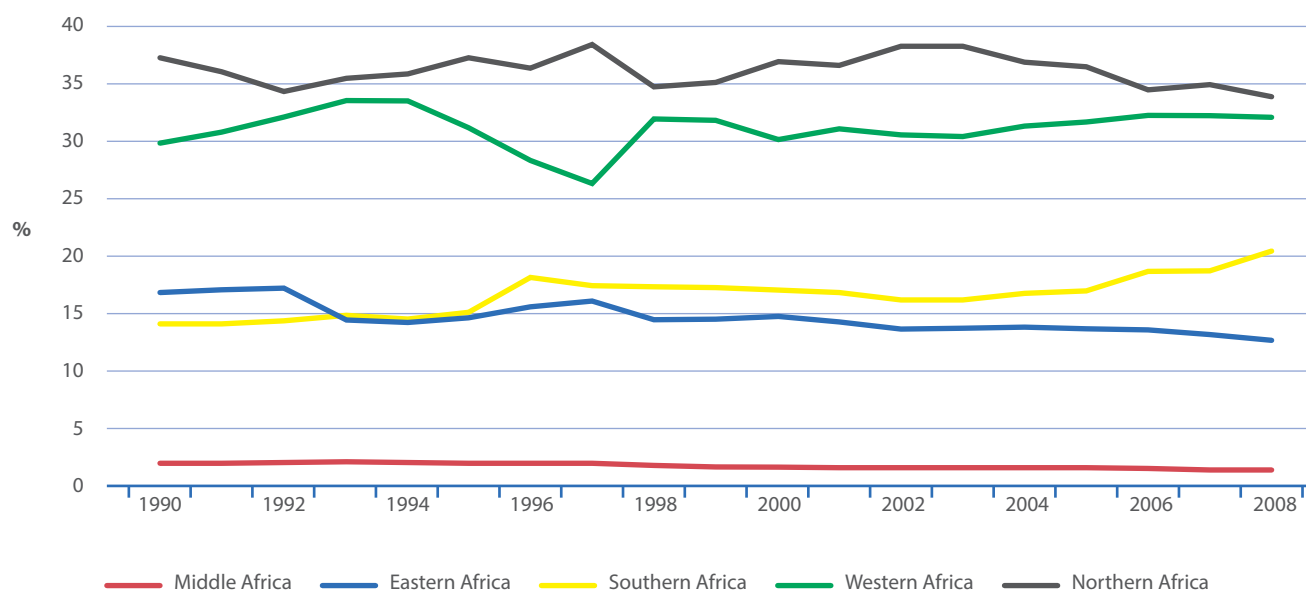


The changing contribution of the African sub-regions to the overall egg production in Africa can be seen from figure 4. It shows the dominant role of the Northern and Western African countries. They contributed 33.7 % and 32.0 % respectively to the production volume. Southern African countries shared 20.3 % of egg production in Africa. Eastern African and Middle African countries combined contributed 14.0 %.

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**Figure 4** The changing contributions of the sub-regions to egg production of Africa.

Source: FAO database



**Table 3** Egg consumption and production in 2000, 2006 and 2011

Source: FAO database

	CONSUMPTION (KG. PER PERSON)			PRODUCTION (IN TONNES)		
	2000	2006	2011	2000	2006	2011
Algeria	2,66	4,53	6,63	84.427,21	156.368,48	250.354,18
Angola	0,65	1,30	1,78	9.105,00	22.296,78	35.868,35
Benin	0,77	0,90	0,77	5.360,00	7.632,00	7.506,00
Botswana	1,92	2,30	1,98	3.375,48	4.361,78	3.930,02
Burkina Faso	2,44	2,44	2,70	28.364,20	33.746,17	43.163,00
Cabo Verde	4,22	3,82	4,65	1.866,00	1.839,17	2.284,10
Cameroon	0,63	0,44	0,37	9.982,74	8.166,00	7.859,00
Central African Republic	0,49	0,49	0,65	1.783,00	1.987,35	2.864,00
Chad	0,35	0,29	0,26	2.895,00	2.977,00	3.146,00
Congo	0,52	0,49	0,74	1.637,00	1.792,00	3.111,74
Côte d'Ivoire	1,82	1,39	1,47	29.339,91	24.588,17	28.457,91
Djibouti	0,29	0,40	0,46	210,00	313,00	389,00
Egypt	2,25	2,46	2,85	148.999,65	179.800,03	226.313,95
Ethiopia	0,37	0,41	0,37	24.296,00	31.884,00	33.248,91
Gabon	1,72	1,57	1,22	2.105,44	2.222,00	1.950,00
Gambia	0,93	2,16	0,84	1.142,41	3.196,74	1.452,75
Ghana	0,87	0,95	1,20	16.424,00	20.921,20	29.834,00
Guinea	1,16	1,68	1,84	10.115,35	16.435,00	20.580,00
Guinea-Bissau	0,64	0,68	0,69	811,00	989,00	1.122,00
Kenya	1,62	1,50	1,87	50.800,00	55.192,20	78.512,23
Lesotho	0,72	0,70	0,79	1.345,00	1.359,00	1.608,00
Liberia	1,62	2,37	2,69	4.680,00	8.036,00	10.957,00
Madagascar	0,94	0,78	0,75	14.724,20	14.731,39	16.179,62
Malawi	1,46	1,30	1,11	16.540,00	17.314,04	17.202,00
Mali	0,67	0,42	0,70	6.874,00	5.190,00	10.134,00
Mauritania	1,54	1,66	2,04	4.171,00	5.367,43	7.566,68
Mauritius	9,15	7,90	5,55	10.837,61	9.609,17	6.853,20
Morocco	6,92	6,62	6,57	198.691,86	201.095,87	210.506,77
Mozambique	0,01	0,38	1,28	237,00	8.235,00	31.498,00
Namibia	1,50	1,57	1,44	2.843,16	3.222,99	3.183,17
Niger	0,45	0,34	0,26	4.899,28	4.664,82	4.232,00
Nigeria	3,01	3,40	3,57	370.416,40	487.251,57	586.891,35
Rwanda	0,23	0,23	0,33	1.955,00	2.202,00	3.643,20
Sao Tome and Principe	2,29	2,95	2,91	318,00	469,00	532,00
Senegal	1,44	1,74	1,88	14.200,00	20.104,61	25.021,69
Sierra Leone	1,21	0,72	1,87	5.008,00	3.806,00	10.962,00
South Africa	5,41	6,62	7,32	242.564,10	324.037,01	380.491,67
Sudan (former)	0,84	0,66	0,74	28.760,00	25.840,35	32.410,30
Swaziland	2,69	4,76	2,46	2.867,19	5.319,85	2.982,03
Togo	0,91	0,81	0,85	4.443,20	4.618,96	5.508,00
Tunisia	7,37	6,97	7,37	70.418,25	70.802,71	79.289,94
Uganda	0,63	0,58	0,98	15.310,35	17.211,00	34.331,00
United Republic of Tanzania	0,92	0,77	0,59	31.129,37	30.571,41	27.579,07
Zambia	3,42	3,19	3,47	34.497,00	37.620,35	47.306,00
Zimbabwe	1,28	1,44	1,78	16.000,60	18.296,49	23.826,00

Table 4 Big players in Africa

Source: TeamPro

POULTRY COMPANIES EAST-AFRICAN	COUNTRY
Brade Gate Poultry Industries	Kenya
Breedtech	Kenya
Kukuchic	Kenya and Uganda
Wendy Farms	Kenya
Kenchic Ltd	Kenya
Kim's Poultry Farm Ltd	Kenya
Sigma Supplies Ltd	Kenya
Coral Company Ltd	Sudan
Kenana	Sudan
Matthew Agricultural Company	Sudan
Ommat	Sudan
Inmaa	Sudan and Djibouti
Alema Farm	Ethiopia
Elfora	Ethiopia
Ethio Chicken (Mekkele Farms)	Ethiopia
Maranatha Farm Plc	Ethiopia
YoKuku Poultry Farm	Uganda
Ugachick Poultry Breeders Ltd	Uganda
Biyinzika Enterprises Ltd	Uganda
Bokomo Uganda	Uganda
Butenga Farmers	Uganda
Kibo Poultry Products Ltd	Tanzania
Kijenge Animals Poultry Feed	Tanzania
Interchick	Tanzania
Mkuza Chicks Ltd	Tanzania
Euro Poultry Ltd	Tanzania



# CONCLUSIONS

1. The poultry meat production and consumption in almost all African countries is low but increasing from year to year. The average poultry meat consumption worldwide is about 15 kg per person per year. In Africa this consumption is about 6 kg per person per year varying from 0.2 kg in Rwanda to 38 kg in Mauritius.
2. Also the egg production and consumption in African countries is low (about 2.5 million tonnes). Worldwide egg consumption is about 150 eggs per person per year. In African countries the egg consumption per person per year is probably circa 40.





