



THE COUNTRY IN BRIEF

COUNTRY:	Tanzania
LOCATION:	Eastern Africa, bordering the Indian Ocean between Kenya and Mozambique
HUMAN POPULATION:	50 Million
PER CAPITA INCOME:	USD 912
LIVESTOCK CONTRIBUTION TO GDP:	8.4%

Poultry means chicken

1. INTRODUCTION

In Tanzania, the poultry sector is still at an infant stage both in the commercial and traditional sub-sector. However, poultry farming does play a pivotal role in both urban and rural settings in terms of food security, source of income, manure and meeting social obligations such as dowry and rituals. The growth of the poultry sector is steady. The current population of chicken is estimated at 69 million, of which 37 million are said to be indigenous (backyard chicken) and the remaining 32 million are commercial poultry, which include 24 million broilers and 8 million layers. Among the existing 4.7 million agricultural households in Tanzania, 3.7 million households keep chicken. Furthermore, the poultry industry has a potential to employ more Tanzanians, especially from the youth who are currently facing unemployment. There is ample land for growing grain and soya to provide enough raw materials to be self-sufficient.

Indigenous chickens are mainly raised by rural dwellers and contribute to almost 100% poultry meat and 20% of eggs consumed in the rural and urban areas respectively, while layers and broilers are raised by urban dwellers. The commercial poultry industry includes the Breeder farms, Hatcheries, poultry farms (layers and broiler farms), traders and processors. Poultry as a source of protein has a competitive advantage over other livestock such as cattle, goat, sheep, and pig due to the fact that it can be produced in large quantities within minimum space and time. As eating habits are changing and the economy is growing, disposable income is increasing and the demand for poultry products is likely to keep increasing.

Table 1:Poultry meat production over the last five Years

Year	Chicken Meat Total (tons)	Total Meat Production (Beef, pork, Mutton, poultry) (tons)
2010/2011	93,534	503,496
2011/2012	84,524	532,711
2012/2013	87,400	553,455
2013/2014	91,700	563,086
2014/2015	99,540	597,757

2.0 RECENT DEVELOPMENTS

During the period under review the industry continued to record steady growth whereby during the year 2013 about 61 million day old chicks (DOC) were produced and in the year 2014 about 63.1 million DOC were produced. The production of DOC is likely to increase as time goes by, due to new investments in poultry breeding farms and hatcheries. Tanzania has been receiving a good number of new investors who are interested in establishing breeding farms and hatcheries. Currently, a major investment is near completion which will be in a position to produce 15 million DOC (broiler and layers) annually. Similarly the demand for indigenous chicken has been increasing, leading to an increase in the number of hatcheries for local chicken from 14 in 2011 to 26 in 2015.

3.0 CONSUMER CONSUMPTION TREND

The production of chicken is largely driven by changes in eating habits due to higher disposable incomes and a preference for poultry. More hatcheries have been built, which are producing more local day old chicks and culminated in the development of a strong vibrant association called the Tanzanian Poultry Breeders Association (TPBA). The per capita consumption of poultry meat is estimated at about 15kgs per annum.

4.0 INPUT COSTS

The success of the poultry industry depends highly on the availability of quality feeds as it accounts for 60-70% of the production costs. The price of poultry feed has remained stable over the last year due to a bumper maize harvest recorded during the year 2014/2015. In addition, with the turnabout of feed manufacturers moving from using fishmeal as a source of protein to soybeans, this has also helped in stabilizing the price of feed. However, the prices are still relatively high and affect the price of the end product (i.e. poultry meat and eggs). Producers who can afford to process their own feed are the ones who can compete in the market, as their cost of production is reduced.

5.0 MARKETING OF POULTRY

Marketing of poultry is mainly live in local markets. There are currently about four chicken abattoirs which have enough capacity to supply the demand for the retail market.

6.0 IMPORTS AND EXPORTS

Since the outbreak of Avian Influenza in the mid-2000, importation of poultry and its products into mainland Tanzania has been banned. Also, stakeholders through their association, (The Tanzania Poultry Breeders Association and The Tanzania Commercial Poultry Association) have been adamant to keep pressure on the government to not allow imports, as imports would have a major negative impact on the development of the local industry. However, since the Tanzanian border controls are not very efficiently controlled, illegal importation of poultry meat is rampant. Tanzania currently does not export any chicken.

7.0 POULTRY HEALTH AND DISEASES

The industry has not face any major disease outbreak as many farmers are now receiving training and applying better on-farm bio-security. Cases of disease outbreaks have been few, especially with commercial breeds of both broilers and layers. Similarly, for indigenous chicken, one of the major diseases is New Castle Disease, but has been controlled well due to the development of a thermo stable vaccine known as I-2.

8.0 EGG INDUSTRY

Eggs are produced both by commercial layer farms in the urban areas and indigenous layers in the rural areas. Egg production has been increasing over the past five years as shown below. Furthermore, the layers sub sector has recorded good and sustainable growth during the year 2014 and early 2015 due to an increase in number of large scale producers, which led to the prices being as low as 4000 per tray (30 egg) (2 USD). Egg prices are now starting to fluctuate more and more due to seasonal demand such as holidays, etc.

Table 2: EGG PRODUCTION	
Year	Total amount
2010/2011	3.3 Billion
2011/2012	3.5 Billion
2012/2013	3.7 Billion
2013/2014	3.9 Billion
2014/2015	4.15 Billion

9.0 Poultry Consumption and Price Trends

The per capita consumption of eggs has been increasing over the years due to an increase in the population (particularly the middle class), mining and a growing tourism industry in Tanzania. Egg consumption has increased drastically from 75 eggs in the year 2014 to 106 eggs per capita in the year 2015, whereas as consumption of poultry meat has only increased a little.

10.0 CHALLENGES

- Reduction in the input cost for poultry and poultry products. This is associated with the use of better quality feed, better bio-security, better management and availability of cheaper and better quality raw materials such as Soya meal, amino acids, vitamins and minerals, Phosphates, enzymes, better farming practices etc..
- Enable organization of the poultry industry. Currently all stakeholders are being encouraged to join the various related associations which will help in organizing the structure of the industry. Tanzania is now bringing together the various associations so as to form an apex association.
- Poultry processors also face challenges like late payments.
- Improving the quality of poultry products, like the quality of day old chicks. This is due to a lack in Government capacity to enforce the existing legislations such as the *breeding farms and hatcheries regulation* responsible for regulating the quality of DOC, *the livestock and carcass grading regulation* responsible for quality of poultry meat, and *the feed resources quality regulation* responsible for quality of feeds.
- Increasing scale of production to take advantage of economies of scale. Poultry production in Tanzania is done at a relatively small scale. Majority of farmers keep an average of 2,000 per batch for broiler and 500 per batch for layers. This is mainly due to the limited access of credit from financial Institutions. Provision of affordable and long term financial support is still lacking.

11. FUTURE OUTLOOK

The poultry industry seems to have a bright future in Tanzania, as the Government in collaboration with stakeholders is supporting and strengthening technical support services and promoting use of appropriate technologies in poultry production. In addition they support the establishment of quality breeding farms and hatchery facilities; poultry producers and trade associations are promoted and encouraged. The government is enforcing the law for the production of quality poultry products. Breeding flock and Hatcheries regulation and registration for hatcheries have been established, whereas hatcheries meet set standards, have been registered and are producing better quality DOC's. In addition, the country has feed inspectors and feed analysts for law enforcement.