Zimbabwe Poultry Association

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COUNTRY: **Zimbabwe** **Nov 2013**

BROILER INDUSTRY: **2011, 2012, Jan-Sep 2013**

Quarter	AVERAGE NETT DAY OLD BROILER CHICK PLACEMENTS PER WEEK (add imports and subtract exports)	AVERAGE WEEKLY BROILER PRODUCTION (slaughters)	AVERAGE WEEKLY BROILER PRODUCTION (live sales)	AVERAGE PRODUCER PRICE NET REALISATION (PER KG)
2011	1,001,910*	352,535†	nd	
2012	1,058,694*	321,426†	nd	
Jan-Mar 2013	1,134,904*	378,332†	nd	
Apr-Jun 2013	1,170,404*	443,504†	nd	
Jul-Sep 2013	1,229,608*	347,879†	nd	US$2.06

* Approximately half the placements are in the small-holder sector for which data is not readily attainable
† Data from large scale/formal abattoirs, nd – no data

EGG INDUSTRY: **2011, 2012, Jan-Sep 2013**

Quarter	Sexed Pullet Sales and Retentions Per Week	LAYING FLOCK IN LAY	AVERAGE PRODUCER PRICE PER DOZEN (AVERAGE OF ALL SIZES)
2011	42,994*	1,128,221†	
2012	53,126*	1,114,689†	
Jan-Mar 2013	46,724*	1,174,586†	
Apr-Jun 2013	43,495*	1,146,486†	
Jul-Sep 2013	43,613*	1,128,061†	US$3.80

* Approximately half the point of lay placements are in the small-holder sector for which data is not readily attainable
† Data excludes the small-scale sector

COUNTRY REPORT:

RECENT DEVELOPMENTS:

Over the past year there has been an increase in the number of chick and feed distribution centres around the country improving accessibility of input supplies.

CONSUMER CONSUMPTION TRENDS:

The poultry industry continues to grow, driven by increased activity in the smallholder sector which accounts for half of national chicken production.

Sexed pullet sales for the period January to September 2013 was 16% less than for the same period in 2012. However, broiler day-old chick production for the period January to September 2013 was 15% higher than in the same period in 2012 and set new highs for the poultry industry with a total of 5.7 million broiler day-old chicks being produced in June and September. Table egg production is estimated to have increased to 6.0 million dozen eggs per month, a 13% increase over 2012, half of which is from the small-scale sector. Over the same period, broiler meat production is estimated to have increased to 8,372mt per month, of which 31% (2,567mt) is processed in large-scale abattoirs.

CURRENT ISSUES AND CHALLENGES:

1. Imports: Numerous reports from the public have been received raising concern regarding low-priced poultry imports, suggesting evasion of duties. Furthermore, some of the product is time-expired and imported from non-approved plants. According to Zimbabwe Statistics Agency (ZIMSTAT) trade figures, official imports of poultry show reduced quantities of chicken compared with 2012, although there was an increase of 98mt between August and September 2013. Industry has also raised alarm regarding the high volume of importation of mechanically deboned meats (MDM) and polony. The reports suggest that the imports exceed the official ZIMSTAT figures of 421mt for September. There have also been reports of reprocessing (splitting leg quarters) and repackaging of imported product either into clear packaging or packaging bearing local processors details in contravention of labelling requirements.
2. GMO-free status of Zimbabwe bans the feeding of stockfeeds with GM ingredients limiting supply options particularly as the industry remains heavily reliant on the importation of maize, soya and wheat bran;
3. Industry is most concerned about the availability of GM-free maize to sustain the livestock sector until the next harvest in May 2014. Zambia has banned exports of maize and is only processing 150,000mt under a previously negotiated government-to-government agreement.
4. Variable and expensive electricity supplies contribute significantly to costs of production;
5. The poultry industry is laden with a multitude of regulations that impose fees and transaction costs impacting on the competitiveness of this sector; and
6. High interest rates and the lack of medium to long term finance also contribute to the high price of livestock products. Interest rates in Zimbabwe are more than twice those in the major competitor countries such as Botswana, Brazil and South Africa.

INPUT COSTS:

Prices of most raw materials in 2013 remain significantly higher than prices in 2012, especially maize (33%), solvent extracted soya meal (12%), maize bran (29%), wheat bran (29%) and fishmeal (21%). During the year, the maize price increased by $22 or 6%, solvent extracted meal decreased by 6% and maize bran increased by 13%. Over the same period the weighted prices of broiler and layer feeds increased by 3% and 1%.

DISEASE AND ANIMAL HEALTH:

Poultry Veterinarian Meetings: The importance of these meetings has been elevated following widespread outbreaks of Newcastle Disease.

Newcastle: There have been increasing incidences and geo-spread of Newcastle Disease outbreaks in ‘vaccinated’ broiler commercial units and un-vaccinated back-yard and indigenous flocks. This has been attributed to the breakdown of a country-wide vaccination programme. In the past, marked reductions in outbreaks (2-3 foci per year) have been recorded following routine vaccination of rural flocks.

AI: Country continues to routinely monitor for the disease.

TRADE DEVELOPMENTS:

1. There is a need to adopt a common approach to address:
   a. zoo-sanitary issues which restrict trade; and
   b. use of poultry feeds containing GMO raws.

OTHER

Nil.