

UNDERSTANDING THE POULTRY VALUE CHAIN: BACKGROUND, STRUCTURE, OPPORTUNITIES & CHALLENGES

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NIGERIAN POULTRY- QUICK FACTS



NIGERIAN AGRIC: QUICK FACTS

Agriculture- the most important sector of the Nigerian economy:

- Agriculture contributed about 29.15% to Nigeria's overall GDP 1st Q 2018 (24.5% in 2017) and over 36% (\$852m) of total non-oil foreign exchange earnings (\$2.34b) in 2017.
- Poultry subsector is the most commercialized of all agriculture subsectors, arguably 25% of Agric contribution to GDP.
- About 65% of 198 million Nigerians are estimated to depend on agriculture for their livelihood

NIGERIAN POULTRY: QUICK FACTS

- Currently, only 1 active Grand-Parent company remaining (Government regulated)
- Several large Parent companies and integrators
- 100s of large commercial integrated farms
- Millions of small poultry businesses and backyard farms
- Sector growth projected at 7-10% annually

NIGERIA POULTRY: QUICK FACTS

- NIGERIA: Number 1 egg producing country in Africa
- However, low per capita consumption (3.05kg)

(Source: Poultry Association of Nigeria, 2014)

COUNTRY	EGGS/ YEAR (BILLIONS)
NIGERIA	15.383
SOUTH AFRICA	7.550
EGYPT	5.600
MOROCCO	3.833
ALGERIA	3.150

NIGERIA POULTRY: QUICK FACTS

- NIGERIA: Number 4 chicken meat producing country in Africa
- Also, very low per capita consumption (1.76kg)

(Source: Poultry Association of Nigeria, 2016)

COUNTRY	(,000) METRIC TONS / YEAR
SOUTH AFRICA	1300
EGYPT	633
MOROCCO	502
NIGERIA	350
ALGERIA	253

NIGERIA POULTRY: QUICK FACTS

- Comparative per capita consumption:

COUNTRY	CHICKEN(Kg) / CAPITA	EGGS (Nos.)/ CAPITA
USA	58.6	305
CANADA	33.5	221
SPAIN	28.4	340
BRITAIN	24.8	183
FRANCE	22.3	292
JAPAN	11.4	334
NIGERIA	1.76	75

POULTRY VALUE CHAIN: POTENTIALS

- Food security
- Job creation
- Wealth Creation
- Potential contribution to trade balance and forex earnings (export market)

CLASSES AND TYPES OF POULTRY

- Turkey
- Quail
- Ducks
- Guinea fowl
- Chicken

CLASSES AND TYPES OF CHICKENS

CLASSIFICATION BASED ON FINAL PRODUCTS

- Meat type/ breed - Broilers
- Egg type/ breed – Layers

CLASSIFICATION BASED ON GENETIC RANKING

- Great grand parents stock (GGPS)
- Grand parent stock (GPS)
- Parent stock (PS)
- Commercial birds (layer, broiler, cockerel)

THE EGG BREEDS



THE MEAT BREED

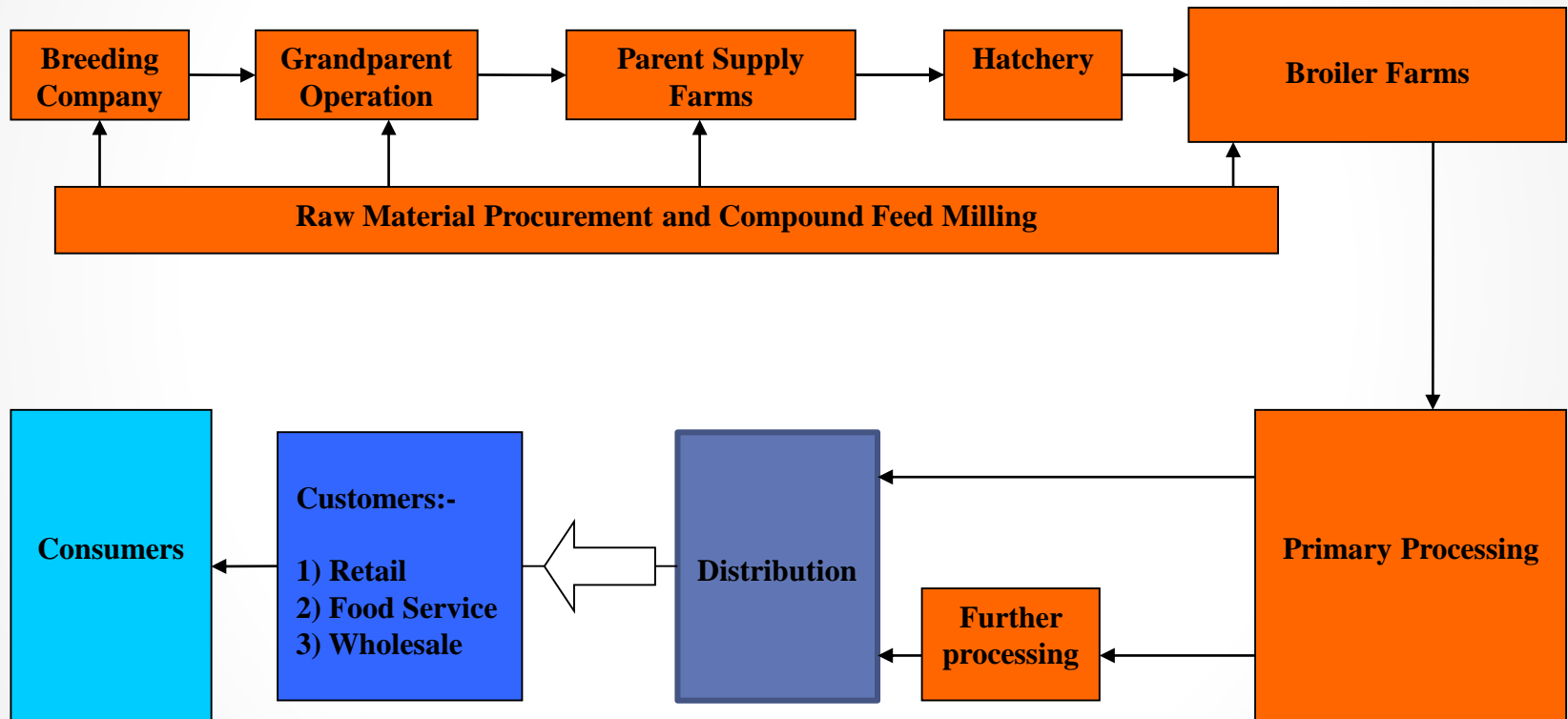
PARENT STOCK (BREEDER)



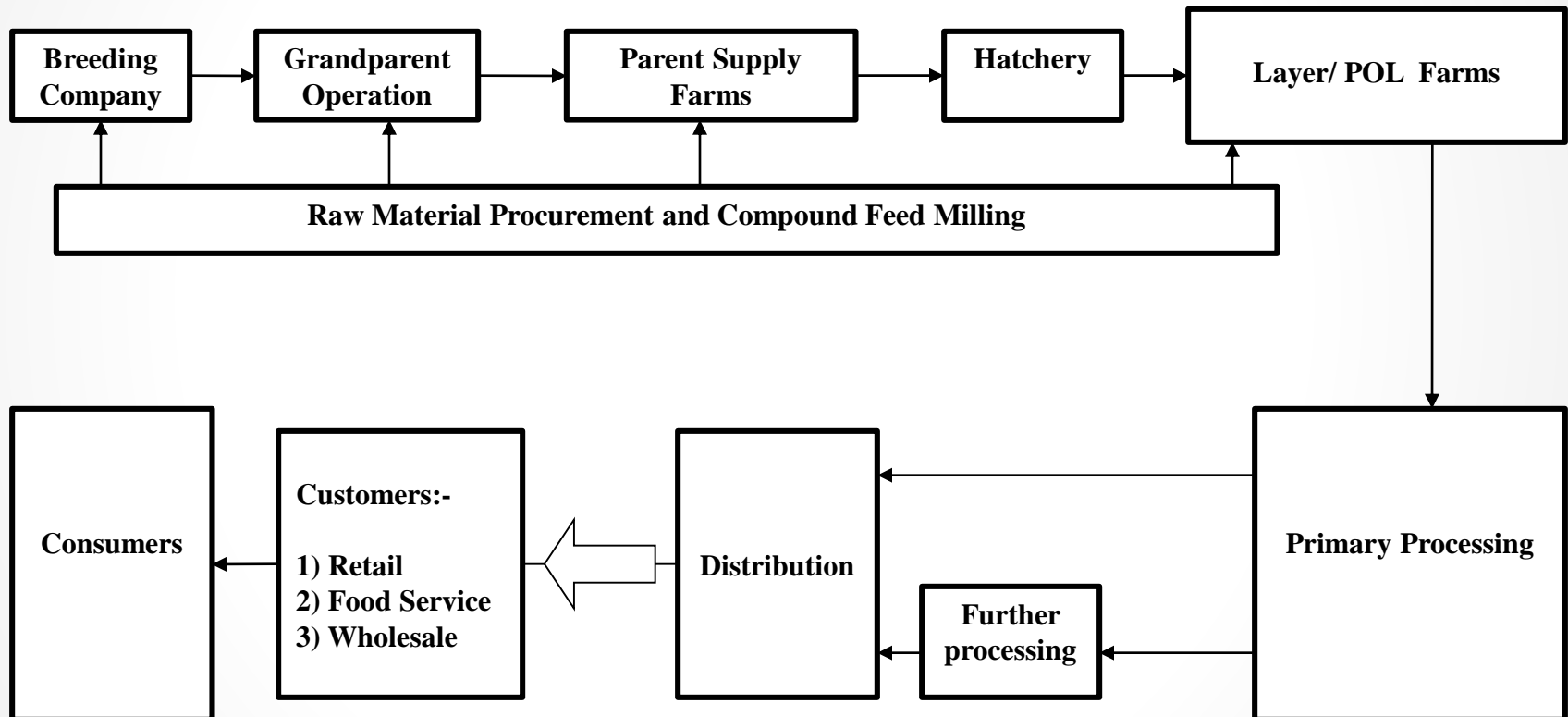
BROILER



THE POULTRY INTEGRATION:MEAT TYPE



THE POULTRY INTEGRATION : EGG TYPE



THE POULTRY VALUE CHAIN

- PRIMARY PRODUCTION (eggs/ meat/ DOC/ POL)
- INPUTS SUPPLY (Finished feed/ raw materials)
- SERVICE (Labs/ consultancy/ Logistics/Hatching)
- PROCESSING (slaughter/ rendering)
- MARKETING & DISTRIBUTION (wholesale/ retailing)
- STORAGE/ WAREHOUSING
- EQUIPMENT SUPPLY

PRIMARY PRODUCTION: EGGS

- Floor Production
- Cage production



PRIMARY PRODUCTION: BROILERS



PRIMARY PRODUCTION: POINT OF LAY

- Rearing from day-old to 14-16weeks



PRIMARY PRODUCTION: DAY-OLD CHICKS

NEWLY HATCHED CHICKS



INCUBATION OF EGGS



PRIMARY PRODUCTION: DAY-OLD CHICKS



PRODUCTION: LAYER PARENTS/ GRAND PARENTS



PRODUCTION: BROILER PARENTS/ GRAND PARENTS



COMMERCIAL FEEDMILLING & INPUTS SUPPLY

FINISHED FEED



FEEDMILL



PROCESSING AND PACKAGING

CHICKEN PROCESSING



EGG PROCESSING



SERVICES

LABORATORY/
VETERINARY

COMMERCIAL TOLL
HATCHING



STORAGE/ WAREHOUSING

COLDROOM

WAREHOUSE



THE POULTRY VALUE CHAIN: CHALLENGES

- Poor income profile
- Illegal imports of frozen chicken
- High and increasing cost of inputs
- Government Policy somersaults
- Power issues
- Availability and quality of feed raw materials
- Funding issues (availability & cost of finance)
- Trans-border trade restriction due to insurgency
- Global challenge of bird flu
- Public health and environmental issues

CHALLENGES?

CHALLENGES
OPEN
DOORS OF OPPORTUNITIES;
TO
INNOVATE
AND
ADD VALUE!

THANK YOU FOR YOUR ATTENTION SO FAR

