Broiler value chains in Ghana and Senegal: organization, challenges and potential policy interventions

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- Ghana and Senegal are pursuing different poultry trade policies. Ghana permits the trade of poultry meat and Senegal banned the importation of uncooked poultry meat.
- In both countries, broiler value chains face high costs of production, especially feed costs, despite their differing policies.
- Domestic chicken trade is dominated by live fowl sales in Ghana and Senegal due to limited processing and cooling facilities.
- Incentives that encourage local and foreign investments in the processing, distribution and marketing of domestic chicken meat are key to the development of the broiler value chains.

Background and aims
Ghana permits the trade of poultry products and is dependent on frozen chicken imports. In contrast, Senegal has banned the importation of uncooked poultry meat since 2006, officially to prevent an outbreak of the Avian Influenza virus. We present the results of Work Package (WP) 3 of the project "Impact of meat and milk product exports on developing countries" (IMMPEX). We present the organization, infrastructure and logistics of broiler value chains in Ghana and Senegal.

Methods and data
The broiler value chains in Ghana and Senegal were studied using multi-stakeholder workshops, key informant interviews and the Delphi method. The multi-stakeholder workshops brought together 44 participants in Ghana and 45 participants in Senegal. The key informant interviews involved 25 actors in Ghana and 19 in Senegal. The Delphi method was used to identify and rank the main challenges facing the Ghanaian broiler value chain. The study was composed of 21 poultry experts.

Key findings
Structure of the Ghanaian and Senegalese broiler value chains
The key actors in the Ghanaian and Senegalese broiler value chains include feed millers, hatcheries, producers, traders, slaughterhouses and distributors (retailers, cold stores, live bird markets).

Comparing imported with domestic chicken meat in Ghana
In Ghana, imported frozen chicken pieces (thighs, wings, backs, feet, gizzard, etc.) dominate the market. Imported chicken meat varies from domestic chicken meat in various ways. First, imported chicken meat is always available with traders (importers, wholesalers and retailers) while live chicken trade is faced with frequent shortages. Second, imported chicken meat...
is more convenient to consumers, saving time spent on preparation. Third, imported chicken is retailed in smaller portions offering consumers the opportunity to buy what they can afford compared to domestic chickens which are often sold live or in its whole processed state. Fourth, imported chicken meat is cheaper compared to domestic chicken meat.

**Dressed chickens being sold in an open market in Dakar, Senegal**

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**Challenges facing the broiler value chains**

The Delphi study revealed that poultry experts in Ghana perceive low-cost frozen chicken imports and high feed costs as the most important challenges facing the broiler value chain. Other challenges that were identified include: limited access to credit, low biosecurity measures, high costs of equipment, poultry diseases, low-quality feed, high costs of DOCs, inadequately equipped slaughterhouses and low quality of locally hatched DOCs. The Senegalese broiler value chain faces the same challenges as the Ghanaian value chain. However, the main differences are that chicken imports, quality of locally hatched DOCs and quality feed are not considered as key challenges in Senegal. Furthermore, both countries have limited processing and cooling facilities. As compensation for the lack of cooling facilities, chicken meat sold in open markets is sometimes treated with formalin, which poses health risks to consumers.

**Conclusion**

Based on our study, the following are some broad policy interventions that policymakers in Ghana and Senegal may consider:

- Incentives that encourage local and foreign investments in the processing, distribution and marketing of domestic chicken meat are key to the development of the broiler value chains. Such incentives could include financial incentives (e.g. grants, loans), technical support incentives (e.g. extension services) and fiscal incentives.

- Capacity development through training and increased extension services is important for improving hatchery practices and poultry husbandry.

**Further Information**

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