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**Report Highlights:**

In 2019, Post contacts estimate Senegal will raise 50 million broilers (imported breeds), which may result in approximately 71,000 MT of broiler meat production. Although most poultry farms raise between 1,000 to 2,000 birds every 45 days, five to six farms reportedly raise around 10,000 or more birds during the same period. Sources report that poultry production grew by 25 percent from 2016 to 2019; however, domestically produced chicken meat is still considered a luxury item by the vast majority of the population. Senegal currently bans the importation of uncooked chicken meat from all country origins.

### **Executive Summary:**

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### **Broiler Production**

In 2019, Post contacts estimate Senegal will raise 50 million broilers (imported breeds) and 34 million local chicken breeds. Sources believe that local chicken breeds are less prone to disease and have adapted to the arid and humid climate of Western Africa. However, these local breeds are raised in informal, backyard operations primarily for household consumption (they are mainly raised to produce table eggs, but sometimes are slaughtered for chicken meat); some may be sold to intermediaries or in open air markets. Most farmers do not vaccinate these local breeds or raise them in open air coops; these chickens usually roam free on the property or in the village. Contacts believe that since Senegal implemented the ban on imported, uncooked chicken meat in 2005 (see Policy section), the production of local breeds has dropped in favor of imported breeds because they have a lower feed conversion ratio, which means these birds are less expensive to produce.

From 2016 to 2019, according to various sources, the number of imported broiler increased from 40 to 50 million birds. Using these figures, Post estimates that in 2019 broiler meat production may be around 71,000 MT (this assumes a chicken mortality rate of five percent and an average weight of 1.5 kg). Post contacts believe there are around 4,500 poultry farms raising imported broiler breeds. However, estimating the total number of farms is difficult given that reportedly there is an influx of investors who temporarily run a small poultry operation for maybe one season, and then quickly exit after earning a profit. According to contacts, there may be only five or six large commercial farms raising around 10,000 birds or more (one farm reportedly raises as many as 120,000 birds) every 45-60 days in enclosed sheds with air conditioning units. Otherwise, most poultry farms are much smaller and raise between 1,000 to 2,000 birds in open air sheds every 45 days (the broilers are harvested at around 1.5 kg to 2 kg).

Poultry broiler farms are mainly located along the Senegalese coast in the Niayes zone (the coastline that stretches between Dakar to St. Louis), and operate from November to April. In comparison to other areas in Senegal, the weather is cooler in the Niayes zone (usually around 18 degrees Celsius), and producers have access to potable water. From around June/July to October, because of high temperatures that cause stress and can increase mortality rates, many smaller poultry farms opt to not raise chickens. Hotel, restaurant, and institution contacts have also noted that chicken meat is generally more difficult to find during this time due to a drop in production. According to sources, the most common diseases for broilers in Senegal are Newcastle disease, low pathogenic avian influenza, infectious bursal disease, coccidiosis, and colibacillosis.

**Photo 1. Senegal: Open Air Sheds**



Source: FAS/Dakar

Most chicken meat that is sold in modern retail or restaurants and hotels is produced by a few large, integrated agribusinesses or large poultry farms. Similar to integrated poultry operations in the United States, these companies sign contracts with multiple poultry farms, and provide these farmers with inputs such as day-old chicks and feed as well as extension and veterinary services. After the birds attain a live weight of around 1.5 to 2 kg, they are sold to agribusinesses at around 1,100 CFA francs (\$1.90) per kg. Integrated agribusinesses also sell feed and day-old chicks to non-contracted farmers, who sell their live chickens to wholesalers and intermediaries at open-air markets in surrounding local markets, although most live chickens are transported for sale in major urban markets such as Dakar.

In Dakar, the price for a whole, freshly slaughtered chicken (cleaned but can include giblets) at open air markets ranges between 1,500 to 2,000 CFA francs (\$2.60 to \$3.45) for 1.5 to 2 kg. In modern retail outlets, the retail price ranges from 2,200 to 3,000 CFA francs (\$3.80 to \$5.17) for a whole bird that weighs between 1.5 to 2 kg; the whole bird is usually frozen (although chilled chicken meat is

sometimes available (possibly defrosted)). Local breeds are more expensive and provide less meat (usually the meat is very tough), and can be as high as 3,000 CFA francs (\$5.17) or more per 1.5 kg.

### **Layer Chickens and Table Egg Production**

For 2019, Post contacts estimate that Senegalese layer operations have the capacity to raise in total five million chickens. Farms are generally located along the coast in the Niayes zone between Dakar and St. Louis. However, high temperatures during the summer months also affects layer production and can cause higher mortality rates. For layer chickens, sources noted that the most common diseases that appear in Senegal are Newcastle disease, low pathogenic avian influenza, infectious bursal disease, colibacillosis, and Marek's disease.

In 2017, contacts noted that Senegal produced approximately 850 million table eggs, of which approximately 60 percent are produced by commercial farms (i.e, farms that have an egg production facility with egg processing and use modern production techniques such as battery cages and occasionally automated systems) and are sold in urban markets in the Dakar and Thies regions. The remaining 40 percent are from smaller farms or informal operations that allow layer chickens to roam free on the property. It is unclear how much of this small farm production is split between local and imported breeds.

According to government contacts, in 2016, three commercial farms, Sedima, Avi Boye, and Jai Lax Mi, compete for approximately 82 percent of the market. Regarding commercial table egg production, larger farming operations can raise more than 300,000 layers. Sources noted that in order to produce 10,300 eggs per day, commercial operations purchase 15 MT of feed every 10 days. Table eggs are sold to hotels, restaurants, and wholesalers/retailers in 24-count egg cartons. The wholesale price is 1,400 to 1,500 CFA francs (\$2.40 to \$2.60) per carton for medium-sized eggs and 1,600 to 2,000 CFA francs (\$2.75 to \$3.45) per carton for large eggs.

Layer chickens are recycled after 18 months and sold to intermediaries for slaughter at around 1,000 CFA francs (\$1.70) per bird. For 2019, Post estimates that Senegal produced about 6,800 MT of chicken meat from spent layers (this assumes a mortality rate of seven percent for layers up to 18 weeks old, a three percent mortality rate for layers over 18 weeks old, and an average weight of 1.5 kg for layers that were slaughtered at 18 months).

**Photo 2. Senegal: Layers in Battery Cages at a Commercial Farm**



Source: FAS/Dakar

**Photo 3. Senegal: Commercial Egg Packaging**



Source: FAS/Dakar

### **Imported Chicken Genetics Support the Domestic Poultry Industry**

Imported hatching eggs or day-old chicks are primarily purchased by large integrated agribusinesses that raise the parent stock and sell day-old chicks to contracted farmers (see the Broiler Production section). There is no local grandparent stock. For broilers, according to Post contacts, Cobb 500 and Hubbard constitute 70 and 25 percent of all imported breeds respectively, and mainly source from South Africa and India. Ross constitutes the remaining five percent and sources from Brazil, France, and Belgium. For layer chickens, Hyline, Babcock, and Novogen source mainly from Holland and France. Contacts note that a few large integrated agribusinesses coordinate the purchase of hatching eggs through a company called AFITEX for the entire Senegalese market. Reportedly, Morocco exports hatching eggs to Senegal by road.

Sources believe that Senegal has about 70 hatcheries, the vast majority of which are informal operations. For broilers and layers, contacts believe that four agribusinesses sell day-old broiler chicks to about 86 percent of the market, and five agribusinesses sell day-old layer chicks to 73 percent of the market. Estimated prices for day-old broiler chicks range between 750 to 800 CFA francs (\$1.30 to \$1.38) for imported breeds. However, prices for day-old chicks can be higher during peak demand periods for chicken meat such as Christmas and Eid (Please see the Consumption Section).

### **Poultry Feed**

Senegal has about eight feed millers of which four account for most of the market. In 2016, the Ministry of Livestock estimated that the poultry industry purchased 269,290 MT of feed, or approximately \$126 million (73.79 billion CFA francs). Feed mills offer starter, grower, and finisher feed for broilers and layer chickens. Grower and finisher feed for broilers and layers constituted 60 and 38 percent of the total, while starter feed for broilers and layers represented the remainder. Feed mills purchase imported ingredients such as corn and soybean meal, as well as local products such as peanut meal, amino acid, vitamins, fish meal, and calcium to produce broiler and layer chicken feed. Depending on the size of the operation, mills can produce between 50 to 800 MT of feed per day.

Regarding pricing, the wholesale price for feed is about 12,000 CFA francs (\$20.70) per 50 kg. Retail price for feed range between 12,800 to 14,500 CFA francs (\$22 to \$25) per 50 kg of broiler feed and 12,200 to 13,000 CFA francs (\$21 to \$22.40) per 50 kg of layer feed. According to contacts, from 2009 to 2017, feed prices were generally steady, and only increased by 1,000 CFA francs (\$1.70) per 50 kg.

### **Photo 4. Senegal: Chicken Feed at an Open-Air Market (starter, grower, and finisher feed)**



Source: FAS/Dakar

## Processed Chicken Meat

To date, a few food manufacturing companies produce processed chicken meat such as chicken sausages. However, most processed chicken meat is imported. Although the market is reportedly small, some contacts believe the market for processed meat has potential to grow, especially for charcuterie, or dried meat.

## Consumption

Because chicken meat is more expensive than other animal proteins such as fish or table eggs, it is considered a luxury item and may only be consumed once per month for the vast majority of the population; otherwise, it may be consumed during certain holidays, such as Ramadan, New Year's, and Ashura, or other special occasions. Local chicken breeds are generally used for producing table eggs, and not often slaughtered for animal protein. Demand for chicken meat is relatively higher in major urban areas such as Dakar. According to government statistics, per capita consumption of chicken meat may be between 4 to 5 kg per year, but it could be less.

Most Senegalese consumers buy live chickens at an open-air market where they have the option to have the whole bird slaughtered and cleaned on site. Middle- to upper-income urban consumers, which represent around 10 percent of the total population, may buy prepackaged frozen or chilled chicken meat at modern retail stores. At both open-air markets and modern retail locations, most chicken meat is sold as a whole bird. According to contacts, chicken parts represent 10 to 20 percent of sales of all chicken meat sold in the retail sector. There is a growing preference for fast food, which has resulted in restaurants offering fried chicken, a popular menu item.

## Photo 5 and 6. Senegal: Chilled Chicken Meat and Delivery Options at Kermel Market in Dakar



Source: FAS/Dakar

## **Policy**

Since 2005, Senegal banned imported uncooked poultry and poultry products from all country origins, which includes fresh eggs and egg products, but exempted the importation of day-old chicks, hatching eggs, and cooked or processed poultry meat, such as chicken nuggets or chicken sausages. According to the Government of Senegal, it originally implemented the import ban to prevent the spread of highly pathogenic avian influenza (HPAI), but the ban has remained in place for the last 14 years. Sources noted that the poultry sector still faces challenges such as high-energy costs, a weak cold chain, and under-developed biosecurity practices.

## **Attachments:**

No Attachments.