Rijksdienst voor Ondernemend
Nederland

Analysis poultry sector Ghana

< An inquiry of opportunities and challenges>

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en Internationaal ondernemen

Colophon

Business Oppertunity Scan	Analysis poultry sector Ghana
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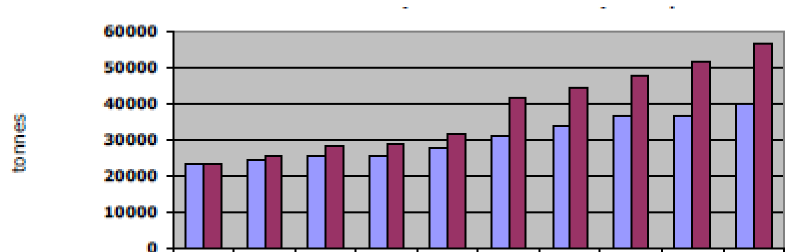
1 Introduction

The Embassy of the Kingdom of the Netherlands in Accra, Ghana is proud to present you with this sector analysis of the poultry industry in Ghana. Ghana has seen stable economic growth figures for the past 25 years and is one of the fastest growing countries in Africa. The poultry sector could play an important role in this path to growth and make a significant contribution to domestic food security. We are inviting Dutch companies to use this brochure to explore the opportunities to establish mutually benefitting partnerships with Ghanaian businesses. The Embassy is looking forward to a fruitful cooperation between the Dutch and Ghanaian poultry sector and offers its full support to welcome and promote successful ventures.

2 Production

As shown in Figure 1, between 2002 and 2011 production of chicken meat and eggs in Ghana has been on the rise.[1] However, there are large differences between the production of broiler and layer birds. Whereas the latter is growing continuously, only 10 percent of the total market demand for broilers is supplied by domestic sources.[2] To a large extent, this is due to high prices of domestic broiler meat which cannot compete with that of imported poultry products that tend to be

Figure 1: National production of the poultry sector



	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Hen eggs (in shells)	23320	24380	25175	25183	27825	31270	33655	36700	36700	39750
Chicken meat	23400	25545	28275	28762	31492	41730	44460	47970	51675	56550

Source: FAO, 2014, p. 6

30-40 percent cheaper. [3] Other constraints for the **broiler industry** are high costs of production, inefficient production methods, limited knowledge of modern poultry keeping, lack of processing facilities and high energy prices. Therefore, to support the local poultry industry, in 2013 the Government of Ghana removed customs duties on poultry inputs such as feed, additives, drugs and vaccines and has facilitated improved access to veterinary services. [4] Moreover, on the 15th of July 2014 the Broiler Revitalization Project was launched aiming to stimulate local broiler production (see 'Domestic policies' section). Looking to develop the sector throughout the value chain, feed mills, hatcheries, slaughtering and processing facilities, cold stores and consumer will all be involved to 'ensure self-sufficiency'.[5] As part of the project, a new poultry and livestock import policy was designed to cut down the country's importation of chicken meat.[6] The policy limits imports to 60 percent, meaning that importers have to buy 40 percent of their produce from local sources.[7] These various interventions create opportunities for the development of the local broiler sector and for Dutch entrepreneurs.

[1] FAO, 2014, p. 6

[2] USDA, 2013

[3] USDA, 2013, p. 2

[4] Ibid

[5] PoultrySite News Desk, 16.7.2014

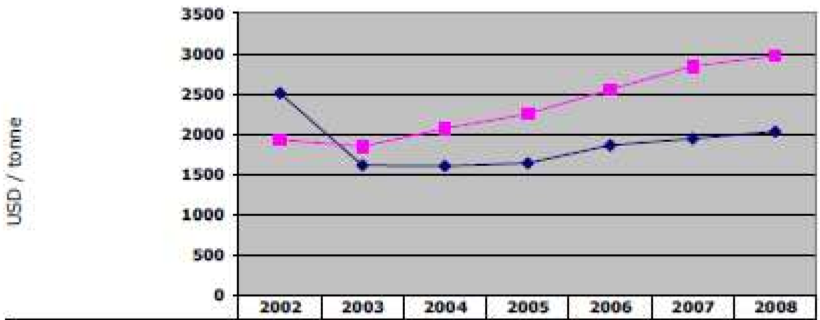
[6] PoultrySite News Desk, 3.4.2014

[7] Meeting at Ministry of Food and Agriculture, 16.7.2014

Whereas meat production faces some challenges, the production of **layer birds** for table eggs has been growing fast with relatively no competition. Between 2011 and 2012, the number of layer birds in Ghana increased by 10 percent, from 21 million to 23 million. Currently, over 90 percent of poultry farmers are raising layer birds for eggs.[8]

Both broiler and layer birds are kept exclusively indoors on deep litter or in battery cages. The broiler bird is ready for the market in 6 weeks and reaches 2.5 kg of weight. **The average cost** of producing broilers in Ghana is estimated at $7 per bird for large-scale producers (see figure 2) and higher for small-scale businesses.[9] Layer birds reach 16 weeks before they start laying eggs. The average industry egg production is around 250 eggs per layer per year and the cost of producing layer birds is estimated at $2 per kilo of hen eggs (in shells).[10]

Figure 2: Producer prices of poultry products



	2002	2003	2004	2005	2006	2007	2008
Hen eggs (in shells)	2509.18	1613.39	1603.95	1640.07	1860.1	1941.9	2032.1
Chicken meat	1932.25	1843.88	2068.56	2251.24	2553.3	2841	2973

Source: FAO, 2014, p. 11

Commercial poultry farms in Ghana are mostly found in the Greater Accra, Ashanti and Brong Afaho regions. These farms can be categorized in three groups: large-scale (over 10,000 birds), medium-scale (5,000-10,000 birds) and small-scale (50-5,000 birds). At the moment, there are less than twenty **large-scale poultry enterprises** in Ghana, producing mainly eggs with limited production of broilers, mostly for festive seasons (Christmas, Easter) when Ghanaians normally buy live chickens. These farms are privately owned and some operate their own feed mills, hatcheries and parent stock. The level of bio-security in these enterprises is high and most of these farms follow the vaccination programme recommended by the Veterinary Services Directorate of the Ministry of Food and Agriculture.[11] Examples of such farms are the *Unity Farms Ltd* and *Akate Farms Ltd* (see Contact Information section).

[8] USDA, 2013

[9] FAO, 2014, p. 11

[10] Ibid

[11] Ibid

Both have won Best National Poultry Farmer Award and keep good records of production with a high productivity.[12] The only large-scale farm in Ghana that exclusively produces broilers is *Darko Farms.*
The vast majority of poultry producers (95 percent), however, falls into the small-to-medium scale group. **Small-scale businesses** mainly produce broiler birds, whereas the **medium-scale category** mainly produces eggs. Both groups practice limited **bio-security**, making these operations vulnerable to disease outbreaks such as Avian Influenza. Yet, the Government of Ghana has been vigilant in the prevention of H5N1 Avian Influenze outbreaks and a surveillance system has been put in place to monitor the threat at borders, market places and resting places of wild birds. [13] An example of a successful small-scale poultry business in Ghana is *Rhema Farms Ltd* in the Greater Accra Region which is supported by Oxfam Novib and the Sankofa Foundation.[14]

Slaughtering and processing facilities for poultry in Ghana are limited. Much of the slaughtering of live birds takes place at the household level or in live bird markets. The few formal abattoirs in the country are listed in table 1. Big poultry processing plants that were operated by Afariwaa Farms and Darko Farms in the 1990s are no longer operating today or have reduced their capacity because of reduced production.[15] However, an emerging category of processors convert chicken meat into nuggets, sausages, frankfurters and marinated chicken.

Table 1: Formal abattoirs in Ghana

Abattoir	Location	Scale	Status
Farmer George	Greater Accra	Large	Established 2004 , not operational
Afariwaa Farms	Greater Accra	Large	Not operational
Asamoah-Yamoah	Ashanti Region	Large	Not operating at full capacity
Gees Fresh Point	Northern Region	Large	Not operating at full capacity, only for Guinea fowl
Akate Farms	Ashanti Region	Large	Operational
Asutsuare Poultry	Greater Accra	Large	Not operating at full capacity
Darko Farms Ltd	Ashanti region	Large	Operating with reduced capacity with 4 800 birds per 8-hr shift and two shifts(9,000 birds /day)
Amas farm	Greater Accra	Cottage	Cottage processing plant
Daniel Kabason	Greater Accra	Cottage	Cottage processing
Aboabo Fowl market	Northern Region	LBM	Whole birds dressed at LBM
Kumasi Fowl market	Ashanti Region	LBM	Whole birds dressed at LBM
Domeh Fowl Market	Greater Accra	LBM	Whole birds dressed at LBM

Source: FAO, 2014, p. 36

[12] Ibid

[13] USDA, 2013

[14] FAO, 2014, p. 25

[15] Ibid, p. 57

3 Animal feed and other inputs

Due to the dominance of layer bird production, Ghana's poultry feed industry is mostly focused on layer feed. The **main ingredients** used for feeding are maize, fishmeal, premix, concentrates and soybean. Except locally produced white maize, most feed inputs are imported. As can be seen in Table 1, prices of most inputs, except vaccines, have increased over the last years. Controlling animal feed costs is critical as it amounts to 82 percent of the variable production costs.[16] Therefore, some feed manufacturers are switching to low-cost substitutes such as cotton-seed cake, palm kernel cake, soybean cake, copra cake, fish meal and other by-products of agro-processing.
Maize typically forms 50-60 percent of the total feed formulation.[17] In fact, the poultry industry consumes almost 30 percent of all white maize in Ghana.[18] Since maize is such an important component of poultry feed, its price is a key determinant of prices of poultry products. Ghana is almost self-sufficient in its production of maize and import numbers are decreasing: between 2011 and 2013 imports dropped with 70 percent. [19] However, now that the Government of Ghana wants to expand the poultry sector, more efficient ways of producing maize and soy beans are needed to increase yields. Between December and January, the availability of local maize is abundant and affluent farmers buy it at this time to store it for feeding throughout the year. Those without surplus money buy it monthly at higher prices, thus reducing their profits. A problem with local maize reported by poultry farmers is that it can be mouldy and of bad quality, causing farmers to add toxin binders to prevent illnesses.[20] Wienco Ghana Ltd. is the largest maize producer in the country through their farmers association Masara N'Arziki in the three Northern regions. Wienco has greatly improved the quality (and quantity) of local maize production and is highly praised by poultry farmers. It is

[16] USDA, 2013

[17] Ibid, p. 4

[18] FAO, 2014, p. 37

[19] Index Mundi, http://www.indexmundi.com/agriculture/?country=gh&commodity=corn&graph=imports visited 22.7.2014

[20] Seminar Koudijs and Shyams, 21.7.2014

*Asutsuare Poultry Farm Ltd **VSD, 2013 *** Multivet, Gh. Ltd 2013
Source: FAO, 2014, p. 12

Table 2: Prices of inputs for poultry production (Ghana Cedis)

Feed ingredient*	Quantity (kg)	2012	July 2013	Change
Wheat Bran	25	7	7.5	7.1%
Maize - White	50	28	30	7.1%
Maize - Yellow	50	37	40	8.1%
Soya Meal 49% - Local	50	70	70	0.0%
Oyster Shell	50	7	8	14.3%
Concentrate 30%	50	98	120	22.4%
Full Fat Soya	1	1.1	1.2	9.1%
Salt	1	0.4	0.5	25.0%
Layer Premix	1	2.9	2.96	2.1%
Broiler Premix	1	2.85	3.92	37.5%
Lysine	1	5.2	5.2	
Methionine	1	15	15	
Seapak 65%	1	2.08	2.08	
Poultry vaccines**				
HB1	1 dose	0.008	0.008	
Lasota	1 dose	0.008	0.008	
IBD	1 dose	0.01	0.01	
Newcavac	1 dose	0.085	0.085	
Fowl Pox	1 dose	0.015	0.015	
DOC***				
Imported brown layer	Single	2.8	2.90	3.6%
Imported white layer	Single	2.85	2.99	4.9%
Imported broiler	Single	2.2	2.30	4.5%
Local brown layer	Single	1.5	2.00	33.3%
Local broiler	Single	1.2	1.5	25.0%

No working towards offering the whole package of poultry feed and wants to be the biggest player in the Ghanaian poultry feed market.

Ghana has about 15 **commercial feed mills** with a total installed operating capacity of about 1000 MT per day. However, because most buyers are small-scale operators, most feed millers produce only 40-50 percent of their capacity.[21] Most small and medium-scale operations prefer concentrates as it is cheap, convenient and easier to transport. Yet, the majority of commercial mills produce mash feed and only a few produce high feed concentrates or pelletize feed. A major feed processing plant in the country is *Ghana Nuts Limited* which has an annual capacity of 60 000 tonnes. It produces its Poultry Master brand, which comprises solvent-extracted soya bean and cotton meal with excellent nutritional quality.[22] Another important feed mill is *Kosher Feed Mill* which is located in Accra and accessible to many poultry farmers. Other commercial mills in Ghana are *Greater Accra Poultry Association, Agricare, Central Feed Mill* and *Higirifred Mills*.
Day-old chicks (DOC) and hatching eggs are mainly imported from the European Union, USA and Brazil (see 'Trade' section). However, several hatcheries with parent stocks in Kumasi also produce DOC, for instance at *Akate Farms* and *Topman Farms*. [23] According to a report by Aning et al. (2008), many of the poultry keepers express concern about the quality of day-old chicks available in Ghana and state that laboratory support is needed to improve the animal health status. Other hatcheries depend on imported fertile eggs for their production of DOC, such as *Darko Farms, Mfun Farms* and *Asayam Farms* in Kumasi or *Africo* and *Afariwa* in the Greater Accra Region. As can be seen in table 2, the largest cost increase for inputs of poultry production was for locally produced day-old chicks with between 25-33 percent. Investing in the development of this input can thus be profitable for local as well as Dutch businesses.

For the control of poultry diseases, the Veterinary Services Directorate of Ghana (VSD) has the mandate to procure **drugs and vaccines** for use in the country. These products must meet the standards recommended by the World Organization of Animal Health and must come from reputable manufacturers. Private veterinary drug companies do the procurement for the VSD, who then supplies to poultry farmers or the drug companies supply farmers directly. Major veterinary drug companies importing drugs and vaccines are *Frankatson Ltd, Multivet Ltd, Reiss Co. Ltd, Maridav Ltd, Huge Ltd, Gokals Ltd, Danex Ltd* and *Agrivets Ltd*. [24]

[21] USDA, 2013, p. 4

[22] FAO, 2014, p. 39

[23] Ibid, p. 18

[24] Ibid

4 Consumption

The estimated per capita consumption of poultry products in Ghana has increased by 33 percent from 4 kg meat in 2010 to 6.6 kg in 2012. [25] Livestock and poultry meat contributes to 40 percent of the total animal protein consumption with the rest coming from fish. Ghanaian consumers in urban areas have a high preference for **imported frozen poultry products** as they are cheaper and are processed as whole chicken or pre-cut. 'In Ghana local processing of poultry into cut portions to facilitate quick and easy use by consumers is limited'.[26] Nevertheless, Ghanaians generally prefer the taste of **local chicken** over imported chicken as it has more flavour and a better structure.[27] *Darko Farms and Cottage Farms* have seen this market opportunity and have opened cold stores in Accra selling frozen local poultry products ranging from whole birds to pre-cut chicken legs.

The annual per capita consumption of **eggs** was 0.6 kg in 1995 and 0.8 kg in 2005, with an annual growth rate of 4 percent.[28]
Consumption of both chicken and eggs continues to increase, despite **rising prices**. The price of a kilo of imported chicken legs is currently $6, compared to $2 in 2012. The wholesale price of a crate of eggs (30 pieces) has increased from $4.75 in 2011 to $6 in 2013.[29] The consumer price of locally produced chicken remains high compared to imported meat: for a whole, dressed, bird one pays 15 cedi ($4.5)[30] whereas an imported whole, dressed, bird goes for 12 cedi ($3.6).
To boost sales, local broiler companies have to invest in proper **marketing** of their products. Most small and medium scale broiler producers do not invest in branding or advertisement and sell only if and when customers come to their farm or shop.[31] Large-scale companies usually have contracts with supermarkets or cold-stores who sell their produce.

[25] USDA, 2013, p. 5

[26] Woolverton and Frimpong, 2013

[27] Seminar Koudijs and Shyams, 21.7.2014

[28] FAO, 2009, p. 146

[29] USDA, 2013, p. 5

[30] Visit to Darko Farms supermarket in Accra

[31] Seminar Koudijs and Shyams, 21.7.2014

5 Trade

Ghana **imports** large quantities of **day-old chicks (DOC) and hatching eggs** from the European Union, United States and Brazil. The Veterinary Public Health and Food Safety Unit monitors and enforces regulations on this importation and ensures that DOC and hatching eggs are accompanied by a health certificate from the country of origin issued by a veterinarian.[32] The DOCs and hatching eggs that arrive at Kotoka Airport are kept in the quarantine section before distribution. Only big farms import themselves, most poultry farmers use importers. [33]

In 2013, the Government of Ghana removed customs duties on poultry inputs such as **feed, additives, drugs and vaccines**. Companies that import and distribute animal feed from the Netherlands are amongst others *Shyams Ghana Ltd* and *Multivet.* The latter also imports drugs and vaccines from the Netherlands.
The **exportation** of live chickens from Ghana to other countries is virtually non-existent. Ghana does however re-export few day-old chicks, eggs and frozen chicken from the EU to some African countries such as Liberia, Sierra Leone, Cameroon, Benin and Uganda.[34] Because of its strategic position, Ghana has the potential to be a regional exporter.

[32] FAO, 2014

[33] Personal communication

[34] Ibid, p. 36

6 Domestic policies

Ghana's poultry imports have increased by 5 percent from 157,000 MT in 2012 to 165,000 MT in 2013, with imports more than quadrupling since 2002.[35] Imports are supplied mainly from the United States, EU and Brazil. Therefore, in the second half of 2014, the Ministry of Food and Agriculture will begin the strict enforcement of a **poultry and livestock import policy** to boost local production and cut down the country's importation.[36] The policy limits imports to 60 percent, meaning that importers have to buy 40 percent of their produce from local sources.[37] The Deputy Minister of Agriculture in charge of Livestock, Dr Hanna Louisa Bissiw, stresses that importers who flout the regulations will have to return the products to the country of origin.
Moreover, a broiler project has been launched on the 15th of July 2014 to boost production, processing and marketing of chicken within Ghana. The **Ghana Broiler Revitalization Project** (GHABROP), through the Ministry of Food and Agriculture is a ten year collaboration project with the Ghana National Association of Poultry Farmers. Looking to develop the sector throughout the value chain, feed mills, hatcheries, slaughtering and processing facilities, cold stores and consumer will all be involved to 'ensure self-sufficiency'.[38] The project will start from Kumasi, as this is where the big poultry farms in Ghana are located. The government will support the project by supplying fertilized eggs to hatcheries for the production of DOCs and by making their buffer stock of maize available for feeding. The target date for the first production of broilers is Christmas 2014.[39]

[35] PoultrySite News Desk, 21.8.2013

[36] PoultrySite News Desk, 3.4.2014

[37] Meeting at Ministry of Food and Agriculture, 16.7.2014

[38] PoultrySite News Desk, 16.7.2014

[39] Personal communication

7 Opportunities for the Dutch

The Netherlands is generally regarded in Ghana as a very important player in the poultry industry and most Ghanaians in the sector have good working relationships with the Dutch. Below we have listed an overview of potential business opportunities in Ghana.

Investments in:

- Start a joint venture or wholly owned foreign enterprise
- Poultry feed production facilities
- Broiler slaughtering and processing facilities
- Set up a training institute for poultry farmers

Exports of:

- Hatchery technology, DOCs, fertilized eggs, parent stock
- Laboratory and animal health technology
- Equipment: drinking and feeding systems, climate control systems, manure drying
- Animal feed inputs: concentrates, pre-mix and pelletized feed
- Feed production equipment
- Vaccines and drugs
- Slaughtering and processing technology

The Embassy of the Kingdom of the Netherlands warmly welcomes you to Ghana and is looking forward to assisting you further with your business plans. For our contact information, see page 17.

8 References

Cover photo obtained from: https://frederickmordi.wordpress.com/tag/kwabena-darko/
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9 Contact information

Broiler farms

Name of company	Darko Farms
Description	Large-scale broiler producer, has own feed mill and hatchery
Website	www.darkofarms.com
Contact person	Gustav Acquaye
Position	General Manager
Telephone	+233 208 168 530
E-mail address	happyacq200@yahoo.co.uk

Layer/ mixed farms

Name of company	Akate Farms
Description	Large scale layer producer, has own feed mill and hatchery
Website	
Contact person	
Position	
Telephone	
E-mail address	akatefarms@yahoo.com

Name of company	Greater Accra Poultry Farmers Association
Description	Forum for poultry farmers in Ghana, also has large feed mill
Website	www.gapfagh.com
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Position	Executive Secretary
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E-mail address	victorianorgbey@gmail.com

Name of company	Unity Farms Ltd
Description	Large-scale layer producer, has own feed mill and hatchery
Website	
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Animal feed

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Name of company	Ghana Nuts Ltd.
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Name of company	Kosher Feed Mill
Description	Commercial feed mill
Website	
Contact person	Ben Quaye
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Name of company	Shyams Ghana Ltd.
Description	Importer of animal feed inputs
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Name of company	Wienco Ghana Ltd.
Description	Importer and distributor of agro-inputs, large-scale maize producer
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Animal health

Name of company	Frankatson Ltd
Description	Importer of veterinary drugs and vaccines
Website	

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Name of company	Ghana Veterinary Services Directorate
Description	Directorate of Ministry of Food and Agriculture that is tasked with the provision of providing quality animal health care services in Ghana
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Position	First Director
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Name of company	Huge Ltd
Description	Importer of veterinary drugs and vaccines
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Contact person	
Position	
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Name of company	Medivet
Description	Importer of veterinary drugs and vaccines
Website	
Contact person	Dr. Appiah
Position	Managing Director
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E-mail address	

Name of company	Multivet Ghana
Description	Importer of veterinary drugs and vaccines
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Contact person	Kwasi Darkwah
Position	Managing Director
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Name of company	Reiss Co. Ltd
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