

<b>COUNTRY</b>	Tanzania
<b>POPULATION</b>	61,253,901(NBS, 2019)
<b>GROSS DOMESTIC PRODUCT</b>	\$62.224 USD BILLION
<b>UNEMPLOYMENT LEVELS</b>	10.6
<b>CURRENCY USED</b>	Tanzania shilling (Tsh.)
<b>NAME OF POULTRY ASSOCIATION</b>	Poultry Association of Tanzania (PAT)- Still under formation)
<b>REPORT COMPILED BY:</b>	<b>Wambura M. Messo</b> Poultry desk officer Ministry of Livestock and Fisheries.

## **INTRODUCTION:**

This report has been prepared by Wambura M. Messo, the Poultry Desk Officer at the Ministry of Livestock and Fisheries on behalf of the Poultry Association of Tanzania (PAT). The PAT is an umbrella poultry association comprised of ten individual associations representing the poultry (9) and feed (1) industry. The aim of this umbrella association is to better understand regional poultry and feed markets and advocate for good production practices.

PAT is a voluntary, autonomous, non-profit and non-political organization and does endeavor to fulfill its objects and functions in the best interest of its members and the Tanzania Society at large according to the Constitution of the United Republic of Tanzania.

## **The Poultry Sector in Tanzania**

The Tanzania poultry sector continues to grow at a steady pace and this is clearly supported by the considerable new investments in parent stock farms, animal feed mills, hatcheries and the provision of extension services by the Government and Private Industry. These efforts have also been supported by new a policy and regulatory framework that provides a conducive environment for the industry to grow. One such example is found in the Hatchery regulation ACT;

1. From 2022 the Registration of Hatcheries & Breeder Farms that has not operated for one year shall be de registered (See Section 8 (b) of the Hatchery Regulations 2019)
2. Each Breeder Farm & Hatchery shall be required to pay Annual Fees (See Twenty Sixth Schedule of the Hatchery Regulations 2019)

### **Regulatory and enabling environment**

There have been numerous government policy and regulatory interventions to support and regulate the livestock sector in Tanzania. These initiatives were intended to support the livestock sector to grow and become more competitive. The National Livestock Policy of 2006 is so far the main policy document that guides the development of the livestock industry in Tanzania. The instruments that support implementation of this policy in the context of poultry industry come from the Livestock Sector Development Strategy of 2010, the Livestock Sector Development Programme of 2011, and various regulatory frameworks with respect to: Veterinary Act, 2003, Animal Diseases Act, the Meat Industry Act, Animal Welfare Act, Livestock Identification, Registration and Traceability Act, and the Grazing-lands and Animal Feed Resources Act (EKN, 2018).

The Meat Industry Act No. 10 of 2006 established the Tanzania Meat Board (TMB) that became effective in 2008. The Tanzania Meat Board focus is to work to create “An effective and competitive meat industry subsector [in Tanzania] by the year 2025.” The TMB is mandated to provide the institutional framework for the Tanzanian meat sector by spearheading the restructuring of the meat industry, establishing a proper basis for its efficient management

These improvements with more private sector investment also did get more involvement of other stakeholders, including the South African Development Community, East African Community, other donor countries development organisations and philanthropist organisation.

When comparing the sector growth between rural, urban and peri-urban areas, the poultry sector growth is much more significant in the peri-urban areas and especially areas surrounding major towns. A big number of small- and medium-scale farmers in the peri-urban areas and in the out-lying towns rear small flocks of chicken in their backyard, mainly because of the proximity to the

market. These farmers produce both eggs and meat, and supply shops and kiosks in the urban centre to the urban consumers.

### *Recent tax and fees changes, exemptions, and reductions for poultry sector in 2020*

- Import duty for fertilized eggs for incubation removed
- Export permit for transportation of table eggs reduced from TZS 1,000 to TZS 100 per tray (from €0,40 to €0,04/tray)
- Import permit for table eggs increased from TZS 2,500 to TZS 5,000 per tray (from €1,00 to €2,00/tray)
- Export and import permits for animal feed reduced from TZS 20,000 to TZS 10,000 per ton (from €8 to €4/ton)
- Reduction of the outdoor advertising fee from TZS 10,000 to TZS 4,000 on motor vehicles promoting own products (from €4 to €1,60)
- Exemption of VAT on agricultural crop insurance MLF, 2020

### **2021 Report**

This report presents the statistics of the poultry and feed production in Tanzania. The poultry Industry includes the following:

1. Parent Stock (Layer and Broilers)
2. Commercial Birds for meat production
3. Hatching Eggs (Layer and Broilers)
4. Table eggs
5. Animal feed

This report provides the status of the general poultry sector and their markets in terms of national and cross border.

### **The Tanzanian Poultry Sector in brief**

From 2019 to 2020 we have seen an increase in production of 40.36% in the local and cross breeds chickens for meat production, compared with a growth of 38.77% from 2018 to 2019.

Between 2020/2021 Tanzania did have a record Egg production with an increase from 3.58 billion eggs in 2019 to 4.5 billion eggs in 2020/2021, while chicken meat production was 86 205.78 tonnes.

**Eggs:** For promotion of egg consumption PAT conducts an EGG WEEK/DAY every year to coincide with the annual Poultry Expo. Eggs are contributed by poultry stakeholders and distributed to several schools. The motto is “An egg per child every day”. This is continuously promoted by the Tanzania Layer Farmers Association (TALFA) and is expected to create impact on egg consumption. Introduction of eggs in complementary feeding diets of infants elsewhere (in Somalia and Ecuador) resulted in high compliance, low attrition, and infant feeding policy change. Use of social marketing techniques, like those in this initiative, could be key for scaling up this food-based intervention or others like it in Tanzania and beyond.

Tanzania is still maintaining an import ban on all poultry products including eggs which had a positive effect on supporting the growth of the domestic poultry sector.

Tanzania also allowed imports of Hatching eggs during the last two quarters of 2021 to try and meet the DOC shortage within the sector.

The increase was mainly due to new investments.

## **Poultry Feed**

The demand for poultry feed is increasing on an annual basis and this is on the back of a growing demand in poultry products at an average growth of 11% annually. As from 2014, poultry feed constituted about 64% of all animal feed consumed in Tanzania.

Tanzania continues to import feed additives from the Netherlands, USA and India and soya bean cake from Malawi, Zambia and India. This provides for an opportunity in more investments in agriculture and the increase in production of soya beans.

Intra-regional export of sunflower seed cake and maize from Tanzania to East African Countries happens and net imports on Soya meal into Tanzania.

Across the region, there is a high level of informal feed production and therefore poor coordination in the animal feed industry, a factor that does contribute to some poor-quality assurance for both final animal feed and raw materials.

## **Challenges to the Tanzania Poultry Industry in 2021**

### **Illegal imports**

Despite of a strong ban there are still very minor illegal imports of day-old chicks into Tanzania from neighbouring countries. In 2021 a total number of **1530** of day-old chicks including **700** layers and **830** of broilers were smuggled from Kenya to Tanzania.

### **Covid 19**

Following the global crisis of COVID – 19, we would like to share updates, challenges, and effects due to the pandemic.

#### **a. Border Closures effects and lock down measures:**

1.a.1. Trade across the border was impossible due to lock down and flight bans. Cross border customers cancelled orders.

#### **b) Scarcity of Vaccines, Drugs and animal feed additives**

Most of poultry required vaccines, drugs, feed additives are imported mostly from China, South Africa, Netherland, Israel, Germany etc. It is unfortunate that these are the countries that are on a full lock down, hence limited imports are currently possible.

c) Due to border closures and flights cancellations, vaccines, drugs and animal feed additives and processed soya meal were scarce

and hence feed production is affected. No supplies were coming into the country and current stocks in the country are very low.

## **2. Risk of Stocking capacities**

- a) There is a fear of shortage of supplies due to the reduction in stocking capacities of local companies.

## **3. Raise in cost of production due to the increase in purchase prices**

- a) Due to the scarcity as explained above, the prices of vaccines, drugs, soya meal and feed additive have increased significantly. The suppliers are not willing to supply product anymore on credit because of the risk that the companies will not be able to pay or they will end up being victims of COVID-19.

## **4. Effects on rural markets**

- a) Tanzania government had discouraged meetings, training, and workshops due to the spread of COVID-19. This affected rural access to farmers. No training was possible for small holder farmers.

### **Avian Influenza:**

Due to both Avian Influenza and Covid 19, poultry companies could not import day old chick (DOC) parent stock in time. Therefore, most companies experienced a decrease in production of DOC's in 2021. This has caused a shortage in the Day-old Chick supply.

### **Challenges in the Feed Sector**

- A limited supply of raw materials for the manufacture of animal feeds (quality and quantity)

- Develop strategies for increasing the production of raw materials. This may include the development of high yielding-early maturing varieties for maize and Soya beans
- Leveraging the structuring of the value chains to ease flow by linking producers of raw materials and primary oil processors with animal feed producers for the supply of plant proteins.
- Create awareness and build capacity of producers and food processors to improve the storage management of maize, rice and sunflower seed raw by-products to preserve especially the quality and therefore supply the market on a continuous basis with product.
- Remove bottlenecks and provide fiscal incentives for regional trade in raw materials for animal feeds.

### **Insufficient Regulatory and policy environment**

- Establish or strengthen the in-country regulatory mechanisms to develop and enforce minimum quality standards for raw materials for animal feed manufacture and final products.
- Harmonize feed standards across the region to facilitate intra-regional trade
- Research and development on the production and handling of animal feed to inform decisions and change policy accordingly.
- Training of experts in feed formulation (Animal Nutritionist) & manufacture of Feed (Factory Managers) and decentralize the feed testing laboratories

### **Limited Organization skills of the Animal Feeds Industry**

- Introduce a set of fiscal incentives to attract big investors necessary to restructure the animal feeds industry.
  - Promote the ability of the industry associations to look at self-regulation for quality assurance as well as to advocate for a better business environmental system for Good Manufacturing Practices, /quality control and auditing.

- Develop a modus operandi for sampling of raw materials for animal feeds.

### Opportunities:

1. Due to the growth in the livestock sector in Tanzania there are many investment opportunities along the animal feed value chain from farm to processing. These could be capitalized by SADC and EAC countries through the harmonization of policies.
2. There is an opportunity for regional trade in feed raw materials and finished products. These opportunities can also open international trade.
3. There is a high potential of regional trade along the poultry value chain considering the COVID 19 and Avian Influenza pandemics which did affect the poultry production cycles. Countries can put strategies in place to avoid these shortages.
4. Model Multiplication: SADC countries could map models that could be multiplied in other countries for growth and sustainability.
5. A Call for policy harmonization is critical for both the animal feed and poultry sector.

**Importation Statistics: Table A shows the imports and exports of feed, poultry and poultry products**

**TABLE A:**

Product	Importation		Exportation	
	Amount	Sourced Countries	Amount	Countries of Destinations
<b>DOC Parent stock</b>	563,800.00	France, Kenya, Mauritius, Nairobi, Netherland, Netherlands, UK, and Zambia	373,670.00	Kenya
<b>DOC Commercial Layers</b>	482,261.00	India, Malawi, and Zambia	210,600.00	Comoro, Kenya, and Rwanda
<b>Table eggs (number)</b>	800.00	Oman, Qatar, and Vietnam	151,587.00	Comoro
<b>Hatching eggs</b>	373,670.00	Kenya Uganda and Zambia	563,800.00	Burundi, Comoro, Kenya, Madagascar, Malawi, and Rwanda

<b>DOCs Commercial (Broiler)</b>	563,800.00	France, Kenya, Netherlands, and Zambia	373,670.00	Comoro, Congo, DR. Congo, Malawi, Kenya, and Rwanda
<b>Soybean meal (Ton)</b>	3,850,143.31	India, Zambia, Malawi, and U.A.E,	168.00	Malawi
<b>Enzymes</b>				
<b>Sunflower seed meal</b>	685,000.00	India	3,460,138.76	Comoro
<b>Maize bran (Ton)</b>			34,499.00	Malawi
<b>Wheat bran (Ton)</b>	5,907.00	Oman, Qatar, and Vietnam	32,456,321.02	Dubai, India, Oman, and Qatar
<b>Blood Meal</b>				
<b>Feed Additives (Ton)</b>	2,548,675.53	Austria, Belgium, Brazil, China, Croatia, Egypt, France, Germany, Holland, India, Indonesia, Japan, Jordan, Joseira, Kenya, Malawi, Malaysia, Mauritius, Netherland, Netherlands, Serbia, Singapore, Singapore, South Africa, Spain, Spain, Netherlands, Turkey, UK, Ukraine, USA, Zambia and Zanzibar	11,303.35	Bangladesh, India, Kenya, and Malawi
<b>Cotton Seed Meal</b>			4,075.50	Burundi, D.R. Congo, and Kenya