

# Challenges in the Small Processor Poultry Sector

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# DEFINITIONS (1 of 2)

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- **Small Processor**

***A place where live poultry is delivered, slaughtered and dressed and where the consumer can directly select for purchase his/her own bird. Birds may be sold chilled but not frozen.***

# DEFINITIONS (2 of 2)

- **Large Processor :**

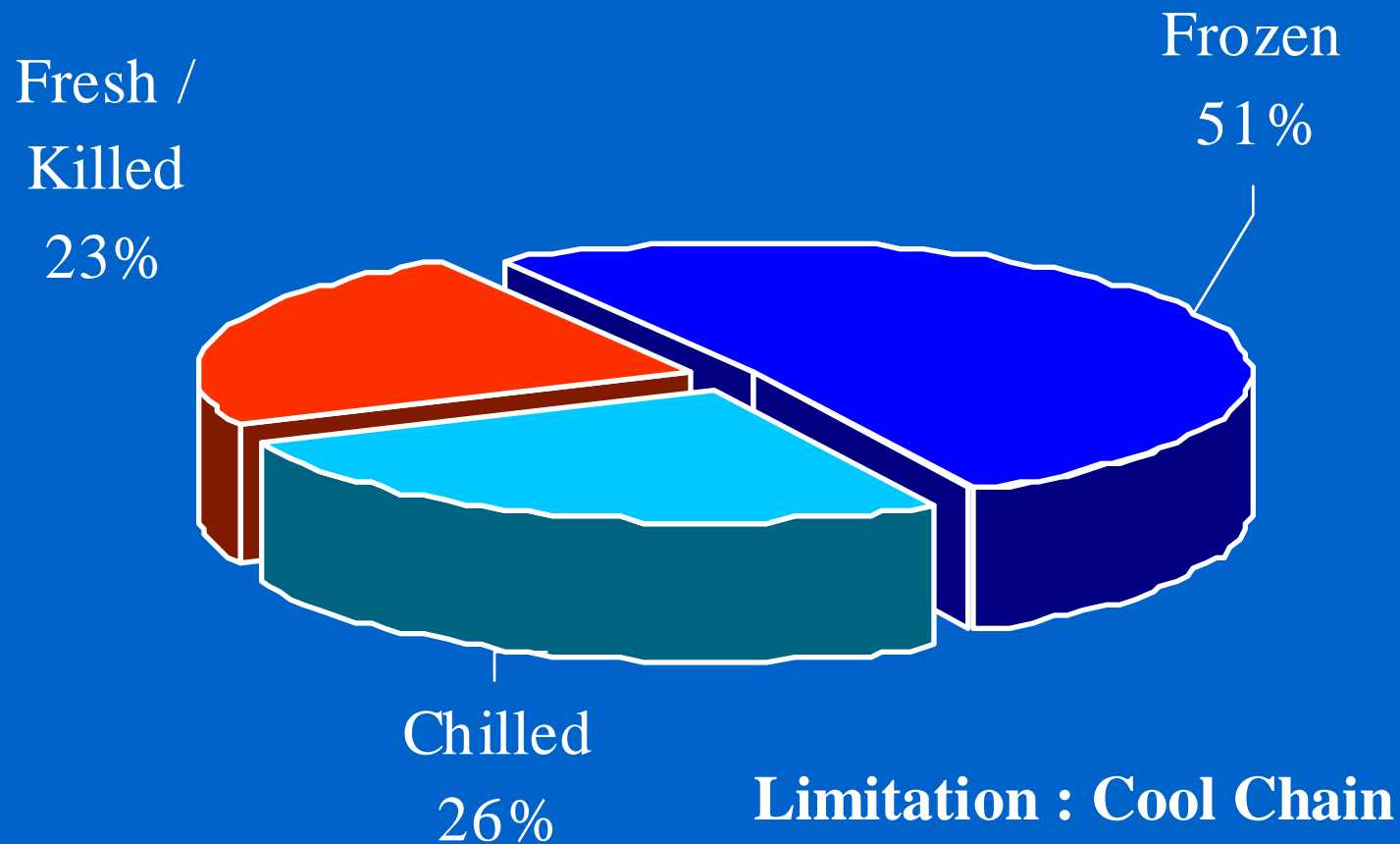
*A place where live poultry is delivered, slaughtered and dressed in a line production manner and is sold to the consumer indirectly as a chilled/iced or frozen product and where full-time inspection is provided by the relevant authorities.*

# SMALL PROCESSOR IMPORTANCE

- Many Caribbean consumers currently prefer fresh, chilled, oftentimes religiously slaughtered product
- Provides relatively more employment than large processor sector ( in T&T 25% of employment in the sector ).
- Many families depend solely on this sector

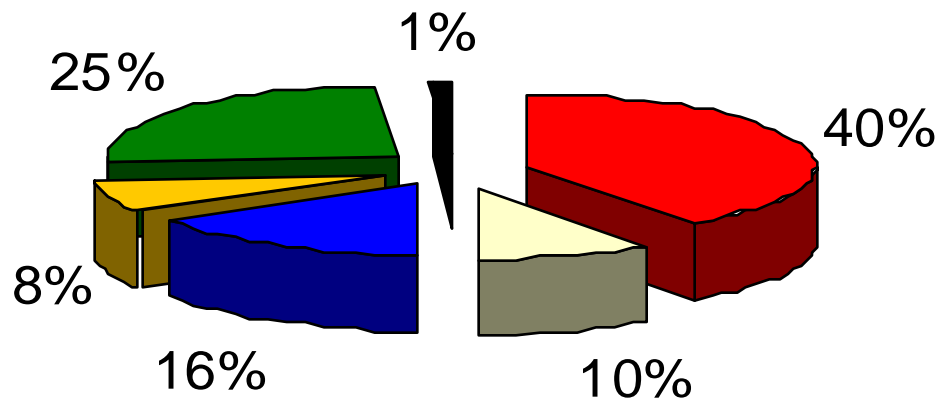
# IMPROVING LEVELS OF CONVENIENCE

## Chicken Product Mix Sold in CARICOM



# MARKET SEGMENTS IN THE CARIBBEAN

## Market Channels For Chicken



- Urban SMkts
- Rural SMkts
- Fast Food
- Tourist
- Cottage
- Export

## DISTRIBUTION OF LOCALLY PRODUCED CHICKEN IN THE CARIBBEAN

	Jamaica	Barbados	T & T	Guyana
<b>SuperMkt</b>	<b>30</b>	<b>40</b>	<b>25</b>	<b>20</b>
<b>Fast Food</b>	<b>15</b>	<b>20</b>	<b>15</b>	<b>20</b>
<b>Rural Shop</b>	<b>18</b>	<b>10</b>	<b>10</b>	<b>7</b>
<b>Hotels</b>	<b>7</b>	<b>20</b>	<b>5</b>	<b>1</b>
<b>Cottage</b>	<b>30</b>	<b>10</b>	<b>50</b>	<b>50</b>

# SMALL PROCESSOR IMPORTANCE

- **% birds processed by small processors:**

<b>Dom. Rep.</b>	<b>80</b>
<b>Barbados</b>	<b>30</b>
<b>Guyana</b>	<b>50</b>
<b>Jamaica</b>	<b>30</b>
<b>Surinam</b>	<b>&gt;96</b>
<b>Trinidad &amp; Tobago</b>	<b>55-60</b>

**In CARICOM – approx.  $30 \times 10^6$  bpa**

# WHAT DO SMALL PROCESSORS PROVIDE?

- 1. Service**
- 2. Point of social contact**
- 3. Poultry Meat**

# FUTURE ROLE

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- **Small processors are an integral part of the industry.**
- **Small processors provide significant socio-economic benefit.**
- **Small processors must remain as a part of the Caribbean poultry landscape but must be encouraged to improve their operations**

# SMALL PROCESSOR CHALLENGES

- **Presents the greatest risk to the Public Health in the poultry meat food chain**
- **Major employment and wealth creation**
- **Could be a barrier to trade**
- **Major impact on other sectors e.g. tourism**

# SMALL POULTRY PROCESSOR IMPROVEMENT PROGRAMME (SPPPIP)

- **What are the issues?**
  - **Location**
  - **Physical Design**
  - **Operational Requirements**
  - **GMPs & Sanitation**
  - **Waste Management**
  - **Government Regulations**

# SPPIP

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- **How do we proceed?**
- **Must have a common CARICOM approach**

# SPPIP

- **Set up a Caribbean Work Group to:**
  - **Develop a Train the Trainers approach**
  - **Develop a training manual**
  - **Develop a draft standard**
  - **Develop a procedural manual**
  - **Develop the design for a model small processor**
  - **Promote standards, model & manual**

*Thank you for your attention.*