

# **CARIBBEAN POULTRY ASSOCIATION**

**Poultry & Egg School 2005**

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**Impact of List A Diseases  
on Global Poultry Industry**

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# Poultry Disease Challenges

1. Diseases Impacting on Global Poultry Industry
2. Caribbean Poultry Industry Profile
3. Poultry Disease Challenges

# Importance of Poultry Disease

- Trade
  - Imports
  - Guyana - Broilers
  - Suriname – H/Eggs
  - T&T – MQUE
  - Jamaica – Ass. States
- Trade Partners Issues
  - USA
  - Brazil
- Consumer Prices
- Ind. Competitiveness
- Development Issues
- Environmental Issues

# Diseases Impacting on Global Meat Trade

FAO/Feedstuffs – Mar 8

- Global Meat Trade 2003
  - Poultry 8.50 m MT
  - Beef 5.25 m MT
  - Pork 3.25 m MT
  - Sheep/Goat 1.00 m MT
  - Total 18 m MT 33 b USD
- **Recent diseases stopped exports from 12 countries**
  - Totaling 33% Trade 6 m MT 10 b USD

# Countries Impacted by Disease Outbreak

Feedstuffs – Mar 8

- **Mad Cow 2003/04**

- Canada / USA
- 1.6 m MT exported
- 25% global exports
- US exports decline from 1.2 m m MT valued at 4 b USD in 2003 to 0.1 m MT 2004

- **Bird Flu 2000/04**

- Europe – Italy, Holland
- Asia – China, Japan, Thailand, Vietnam, Cambodia, Indonesia, South Korea, Laos, Pakistan
- Americas – , Chile, USA ( & New Castle Disease), Canada

# Impact of Disease Outbreaks

- Trade Losses & Gains
  - China, US, Canada poultry export decrease
  - Brazil, Indonesia and Malaysia exports increase
- Destabilized Markets/ Fluctuating Prices
  - Exporting country downward pressure meat prices
  - Importing country - increase in pork prices
- Increased Farm Costs for Depopulation
- Public Disease Control Costs
- Income Vulnerability of Small Producers

# AI Outbreak Impact - Europe

OIE/FAO/WHO Reports

- **Italy (2000) –**
  - Farms infected – 413
  - Birds culled - 14 m
  - Compensation - 63 m US
  - Cost to industry - 629 m US
  
- **Holland (2003) –**
  - Flocks culled 25% all flocks ie 30 m birds.
  - Humans infected - 89
  - European poultry consumption fall by 5%

# AI Outbreak Impact - Asia

## OIE/FAO/WHO Reports

- **Asia (2003/4)** – 12 countries. Birds culled - 100+ m birds
  - China –
    - Exports drop by 20%
    - Chicken consumption down by 20%+
  - Japan –
    - Chicken consumption drops 20%
    - Imported poultry prices increase by 50 – 80%,
    - Pork Prices increase 40%
  - Thailand/Vietnam
    - Thailand – Flocks culled 25%, 36 mil birds
    - Viet Nam – Flock culled – 15%, 38 mill birds
    - Thailand/ Vietnam - 24 humans died.
  - Pakistan –
    - Broiler prices down 40% force small farmers out of production
    - 5.4 b Rs lost
    - Pork prices increase.
  - Bangladesh – No outbreak
    - Small farmers devastated 66% egg farmers/ 33% small broiler farmers exit

# AI/END Outbreak Impact - Americas

OIE/FAO/WHO Reports

- **Chile (2002)** –
  - Control cost - 50 m USD,
  - Exports lost - 100 m USD,
  - Poultry price increase - 17% impact low income households
- **USA/Virginia (2002)** –
  - Farms Affected - 200 farms ie 5 m birds
  - Farmers cost - 140 m USD
  - US Export markets closed
- **USA (2003/4)** – Other NCD in California, AI in Texas, AI in Eastern Seaboard
- **Canada (2004)** –
  - 22 commercial/ 147 b-yard in Fraser Valley/ BC infected.
  - 80% farms ie 19 m birds quarantined
  - Flocks culled - 1.3 mil culled, Processed - 15 mil, Cleared - 2 mil

# AI/END Outbreak Impact - Others

## Trade Reports

- **Brazil ( 2003/4) –**
  - FOB Prices increase 47% to 1,500 UD/MT
  - Increases range 25 – 75% depending on product
  - Export Volumes – 10% up
  - Market Penetration - Increase
- **Asia (2003/4) –**
  - Indonesia/Malaysia Supply Japan
  - India Supply Saudi Arabia
- **USA (2003/4) -**
  - Mix of Causes – Atkins Diet/ Grain Prices/ BSE and AI
  - Whole Birds Prices –20% up
  - Leg Quarter Prices – 90% up to \$0.35 US/Lb from \$0.18 US/Lb

# But Impact is Related to Response As Reported in 2 US LPAI Outbreaks

- **Fast Strong Response**
  - North Carolina/ USA
  - Length of outbreak: 7 wks
  - Flocks pos: 12
  - Birds destroyed: 63,604
  - Cost: \$ 1 mill USD
- **Slow Weak Response**
  - Virginia/US A 2002
  - Length of outbreak: 17wks
  - Flocks pos:197
  - Birds destroyed: 4,743,560
  - Cost: \$130 mill USD

# Caribbean Poultry Industry Profile

- Consumption
  - 44 Kg / Capita
- 5 Yr Con Growth
  - 2 - 3%/annum
- Chicken/Meat Share
  - 80%+
- Regional Production
  - 65%+
- Agro - Ind Rank By Sales
  - Top 3
- Turnover
  - 390 mil USD
- Output
  - 130 m birds/ 40 m doz eggs
- Investment
  - 500 mil USD
- Grain – Corn/Rice
  - 50,000 Acres
- Employment
  - Employment - 35,000 + 5,000
  - Farmers/ Cottage Processors – 18,000

# Caribbean Poultry Industry Disease Challenges

- Rural Broiler Farmers  
Market Share Significant
  - Jamaica - 40%, 10,000 No
  - Guyana - 25%
  - Suriname - 25%
  - T & T - 05%
- Many Small Egg Farmers
  - Jamaica - 2,000
  - OECS - 400
  - Barbados -
  - Guyana -
  - Suriname
- Duck Meat Entering Supermarkets so Duck Farming Growing
- Disease Free Certification for Importation of Other Poultry Eggs??

# Caribbean Poultry Industry Disease Challenges

- Cottage Processor Markets
  - Jamaica - 40% - 10,000
  - T & T - 50% - 2,000
  - Guyana - 25% - 1,000
  - Suriname - 50% - 500
  - T&T/Guy/Sur - Ducks
- Live Bird Markets
  - Hong Kong (14 Hrs)
  - Toronto ( 9 Hrs)
  - New York ( 6 Hrs)
  - Delamara ( 5 Hrs)
- Pet Bird Trade
  - Transshipment South America
  - Weak Quarantine Posts
  - Farmer Reg. / Tracibility
- Game Birds
  - Cock Fighting
  - Pigeons
  - Illegal Trade/ Games
- Bird Bio Diversity
  - Migratory Species

# SO Why Wait!!

- Implement & Test Your
- Emergency Poultry Disease Management Program
- With a Field Simulation
- **IN YOUR COUNTRY**