



Appendix 1

Profile of the TT Poultry Industry 2024

The Poultry Industry is the largest Agro Industry in the country with significant linkages to other sectors.

The Trinidad & Tobago Poultry Industry is a major contributor to food and nutrition security to the nation through the supply of 45 M broilers and 15M dozen eggs annually.

Poultry meats account for 85% of all meats consumed and 100% of table eggs¹. These products supply 65% of high-quality dietary protein to citizens and visitors.

The large volume feed requirements of the poultry sector, that animal feeds in general can be reasonably and feasibly produced in T & T to supply non-poultry needs for cattle, pigs, small ruminants and horses.

Most of the producers have fully integrated enterprises that operate 14 commercial manufacturing plants that include:

- Grain Terminals
- Feed mills
- Hatcheries
- Farms
- Meat Processing Plants
- A fleet of over 200 trucks involved in distributing materials along the entire value chain.

In addition 40% of chicken sold locally are processed by the over 3,000 SME Cottage Processors (Pluck Shops/Poultry Depots) which make a substantial socio-economic contribution.

Contribution to the Economy:

GDP - Contribution to value addition in agriculture manufacturing GDP is estimated to be between 50 – 60%

Employment:

The Local Poultry Industry employs over 10,000 people of which the majority - 60-70% - are single parent women.

In addition, the 3,000 SME Cottage Processors each employs between 3-5 persons again approximately 60% women.

It is worth noting that outside of the State and State agencies, the poultry sector is the largest employer of tertiary-trained personnel.

Linkages to other Sectors of the Economy:

The industry has important linkages to other Sectors within the Economy including *inter alia*:

- **Key Suppliers of:**
 - Supermarket Sector – Key Supply Chain Partner.
 - Food Service Industry – Key Supply Chain Partner.
 - Hotel and Hospitality Industry – Key Supply Chain Partner.
 - School Feeding Program – Key Supply Chain Provider.
 - Hospitals – Key Supply Chain Provider.
 - Security Services, including Coast Guard, Police and Army – Key Supply

- Chain Provider.
- Pork and Other Meat Processors – Chicken Product as Raw Material for further processing.
- Farms – Feed for Ducks-Swine-Dairy-Small & Large Ruminants & Agua Culture.
- Race Horse Industry – Equine Feeds.
- Households and Private Security Service Providers – Pet Food.
- Farms supply fruit and vegetable Farmers with > 10,000 MT of Organic Fertilizer (Manure) per annum.
- **Supporting Local Producers/Manufacturers:**
 - Packaging Inputs, including supplies from the plastic resin converters, paper converters and cardboard box manufacturers.
 - Processing Plants & Hatcheries - Water Tanks and other Crate Type Storage Bins.
 - Farms – are the second largest consumers of Water Tanks after Housing.
 - Feed Mills utilize by-product from the Flour Mills (Wheat Middling) Rice Milling (Rice Bran), Brewing Industry (Spent Brewers Grains) Quick Service Restaurants Sector (Spent Cooking Oils)
 - Farms utilize Rice Hulls and Wood Shavings for bedding in the chicken Pens.
 - Stationery and Paper Products.
 - Refrigeration Equipment and Services – Including Truck and Cold Storage Warehousing Insulation Paneling and Construction.
 - Laboratory and Veterinarian Services for Best Practice in Animal Health, Product Quality and Food Safety Assurance Programs.
 - UWI (Vet School) & UTT (ECIAF) – Collaborative Efforts for Training Industry Staff and Utilization of Industry Facilities for Student Course Work Training.
 - EMA and other Professional Green Environmental Professionals to ensure that the Industry is line with Environmental Laws and Best Practice in Effluent and Waste Water Management practices.
 - IT and Banking Services.

It is to be noted that the major investments in new technology both at the Farming and Processing Plant levels are systematically reducing the environmental impacts of the industry.

3.0 EXPORT POTENTIAL OF THE LOCAL POULTRY INDUSTRY

FEED –

The Feed Manufacturing Sector of the Industry has been the most successful component exploiting opportunities within the CARICOM Region for Poultry and Livestock Feeds, however the Industry takes note of the opportunities in the Pet Food Segment not only in the Export Market but also within the domestic TT Market, where just as reference the imports into T&T approached TT\$70M.

Poultry Meat Products

The Industry possess the installed productive capacity to export. The fact that the foreign

¹ Table Eggs have on occasion been Imported to meet exceptionally high seasonal demand especially at Christmas.

foodservice franchises operating in T & T use >95% of locally-produced poultry meats in their operations is testimony to the quality, standards, consistency and reliability of our products.

One of the benefits arising out of this relationship with the internal Brands is that the industry's productive facilities are regularly audited on an annual basis by the various foreign franchise owners to the same standards that apply to their home-based facilities.

Table Eggs

The Local Table Egg Producers, have recently started exporting to Regional Markets, most notable being to Barbados.

Further Processed

The greatest opportunity for growth and exports are for Further Processed Products – i.e. **Ready to Cook and Ready to Eat Products**, especially as we consider T&T highly regarded status in the variety, flavours and quality of our food options and offerings – and in this regard major investment continues to be made in this sector.

The local industry has already been involved in exports of poultry meats, some further-processed products, feeds and day-old chicks within the region. These exports can be grown and extended extra-regionally when T & T fully implement the requirements of the SPS Agreement of the WTO to which we signed in 1994 in Marrakech.

We are also very proud to report that the Local Poultry Industry facilities have been audited and approved by the Caribbean Agricultural Health & Food Safety Agency (CAHFSA) as part of a initiative to develop intra-regional trade in poultry products.

This initiative was based representation of the Regional Industry by the Caribbean Poultry Association (CPA) at the COTED.

4.0 POULTRY STANDARDS:

To aid in our Export Drive and as part of our initiative to raise standards in the industry to a consistent regional level, the PATT have collaborated with the CPA & CROSQ to develop regional standards for Poultry Meats, Table Eggs and Animal Feeds. These standards have received COTED approval but are yet to be implemented in T & T.

Full and urgent implementation of the SPS Agreement and the regional standards will place the industry in a position to explore and exploit both regional and extra-regional export opportunities.

The Attached Page Highlights the Key Statistics of the TT Poultry Industry for the year 2017 at a glance.

¹ Table Eggs have on occasion been Imported to meet exceptionally high seasonal demand especially at Christmas.

Key Statistics:

1. Contribution to Agricultural GDP: 60% (2005 FAO Study).

2. Food Security & Nutrition:

- 85% of All Meats Consumed.
- 65% of Protein.
- 100% Table Eggs¹.

3. Sales

- Broiler Meat - TT\$ 1,850m^E wholesale
- Table Eggs - TT\$ 175m^E wholesale
- Feed (3rd Party Sales & Exports) - TT\$ 52m
- Total - TT\$ 2,077m^E

4. Output

- 44.5M^E Heads Broilers - 75,139 MT. (2023-74,269MT)
- 8M^E Dozen Table Eggs

5. Value Added Products - TT\$ 9500m^E

6. Exports - TT\$ 3.8m^E.

7. Manufacturing Plants - Further Process(2), Primary Process (4), Chicks(5), Feed(5) = 15

8. Small Entrepreneurs

- Farmers	- 585	
- Cottage Processors	- 3,000 ^E	
- Trucking Contractors	- 200	-

9. Employment

- 10,000^E – Direct Employment.
- 9,000^E – Pluck Shop Sector
- 25, 000^E – Associated Industries.

10. Linkages -

10.1 Key Supply Chain Partners to:

Food Services Industry - Supermarket Industry - Hotel & Hospitality Industry.

10.2 Manufacturing Sector –

Flour Mills – Breweries - Packaging & Labelling - Cleaning Chemicals –
Pharmaceuticals - Water Tanks - Plastic Products.

10.3 Service Sector:

Banking, Information Systems Refrigeration.

10.4 Agricultural Sector:

Feed to other Poultry & Livestock Sectors, Equine & Pet.
10,000MT - Organic Fertilizer (Manure) for vegetable farmers.

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