

Proposed National Poultry Policy- Draft

Introduction

Currently, poultry production stands as one of the most developed sectors in Sri Lanka's livestock industry. While chickens are indeed the most common and economically significant poultry species, other poultry species also hold importance for various reasons. Poultry plays a vital role in supplementing the country's animal protein needs while contributing significantly to the national economy. The contribution of agriculture sector to the national GDP in 2022 was 7.5 of which contribution of animal production was 9.33% (Central Bank Report, 2022). Out of that poultry sector which is the highest contributor contributed more than 90%. Furthermore, it plays a pivotal role in supporting livelihoods by providing both direct and indirect employment opportunities within the poultry value chain.

The Sri Lankan poultry industry encompasses three primary segments: layer, broiler, and backyard poultry, each with distinct products, breeds, and management systems. Among these, the broiler sector is the most advanced. The layer industry consists of small-scale farmers (typically with fewer than 5,000 birds), medium-scale operations (5,000 – 50,000 birds), and large-scale farmers (>50000). In contrast, the broiler industry, largely vertically integrated, is usually dominated by a few major producers with a scale of 150000 – 200000 birds who supply 70% - 75% of the country's broiler meat demand. Family poultry or generally known as backyard poultry, a less organized system, involves indigenous or cross breed birds raised in free-range or semi-intensive management systems, mainly for eggs and typically with flock sizes ranging from 10 to 100 birds. This sector primarily serves local protein needs and plays a role in poverty alleviation within rural communities.

Eggs and chicken meat are essential sources of animal protein in Sri Lanka. In 2021, the country produced an average of 2,935 million eggs and 236,790 metric tons of chicken meat, resulting in per capita availability of approximately 132.3 eggs and 10.68 kilograms of chicken meat (Statistical Bulletin 2022, DAPH). There is a potential for increased egg and meat production to meet both national and international demands.

The Sri Lankan poultry industry, particularly the broiler sector, has embraced advanced technologies in breeder and commercial operations. Similarly, poultry feed manufacturing systems have reached internationally accepted standards for producing high-quality feed. However 30% self-animal feed mixers are producing animal feed for their own farms mainly for layers. Many large-scale poultry producers have obtained SLS/ISO certifications for their establishments and products, ensuring that the quality of poultry products meet international standards. This positions the industry for potential expansion to serve international market.

Evolution of the Industry

In the early 1900s, poultry farming in Sri Lanka was primarily an integrated system, with crops and livestock coexisting in extensive and semi-intensive backyard rearing systems. While this system met local egg and family meat needs, its productivity was limited, and it lacked organization. However, starting from the 1950s, as urbanization increased and consumer demand grew, poultry farming transitioned into a popular income-generating industry. Government programs aimed at improving the poultry sector through technical guidance, genetic improvements, and research further transformed it into a well-organized, high-income system. In the 1960s, poultry breeder farms were established, and the broiler sector was upgraded. Post 1980, the industry embraced advanced technologies, improved genetics, and increased private sector involvement.

Today, the poultry meat production system comprises grandparent, parent, and commercial broilers, while egg production has parents and commercial layer segments. Backyard poultry still plays a vital role in supplying animal protein to rural communities. Over the last few decades, poultry production has experienced exponential growth, with the poultry population increasing threefold from 2009 (13.62 million) to 2018 (40.64 million), demonstrating an annual growth rate of 19.84%. The broiler industry has driven this growth, while the layer sector has seen limited improvement.

Challenges faced by the poultry industry

Despite its well-established status and ability to meet demand, the Sri Lankan poultry sector faces several challenges. As an import-dependent industry, it grapples with high costs for inputs, including major poultry feed ingredients, day-old chicks of grandparent and parent stocks, poultry shed accessories, modern equipment for hatching and processing, and feed production. Consequently, the cost of production for eggs and chicken meat is higher than other South Asian countries.

The poultry value chain encompasses production, transportation, processing, packaging, storage, distribution, and retailing. At each stage, costs accumulate, ultimately affecting retail prices. If not properly managed the complexity of the poultry network can introduce disease risks for both chickens and human.

In summary, Sri Lanka's poultry industry has grown significantly and contributes substantially to the national economy. However, it faces many challenges related to production cost, scarcity of feed raw materials, value chain complexities, and disease risks. Addressing these challenges is crucial for ensuring food security and sustaining the industry's growth.

By taking a holistic approach that considers the needs and challenges of all sectors within the poultry industry, a comprehensive poultry policy ensures its long-term sustainability while meeting the demand of consumers and protecting the environment.

- **Vision**

To be a globally competitive industry providing affordable animal-source food to the nation.

- **Mission**

Develop a sustainable poultry industry that provides safe and nutritious animal protein to the consumers ensuring food security.

- **Goals**

1. Ensure sustainable and profitable poultry industry by improving productivity.
2. Ensure availability of quality and safe poultry products at an affordable price to fulfill the national requirement.
3. Achieve globally competitive poultry export market.
4. Increase contribution to the National GDP

- **Objectives**

1. To achieve national and international food safety standards of poultry and poultry products
2. To achieve national and international health and management standards of poultry and poultry products.
3. To ensure availability of quality and safe poultry feed and feed ingredients at affordable price
4. To facilitate export of poultry, poultry products and poultry by products
5. To create a business enabling environment for sustainable poultry industry.
6. To promote and streamline backyard & alternative poultry production systems.
7. To facilitate research and development in relation to poultry.
8. To ensure availability of qualified and trained human resource to provide required service to the poultry industry
9. To promote environment friendly poultry industry.
10. To ensure welfare of the poultry.
11. To increase participation of youth and women in poultry industry.
12. To establish data management system (Develop a system for analysis of national and international market trends)

Policy Objective 1 :

To achieve local and international food safety standards of poultry and poultry products

Produce quality and safe poultry products that meet required regulations and standards from farm to fork in order to ensure public health.

- Upgrade existing national standards in par with international standards for poultry value chain
- Establish food safety surveillance and monitoring system at national level
- Improve quality assurance facilities for poultry and poultry products

Actions

- Collaborate with Sri Lanka Standard Institute to review existing standards and make necessary amendments.
- Enforcement of developed/established standards.
- Implement national surveillance and monitoring program in poultry value chain to ensure quality and safe products.
- Upgrade existing laboratories to accredited status
- Establish traceability system for poultry value chain.
- Expand government veterinary service for food safety testing and monitor food safety regulations.

Policy objective 2 :

To achieve national and international health and management standards of poultry

- Improve poultry disease monitoring, prevention, control and surveillance (MCS) in compliance to standard poultry management practices.
- Improve bio security and bio safety measures in the poultry production chain
- Review and improve the monitoring system for prudent use of veterinary pharmaceutical and biological products.
- Implement Good Animal husbandry practices for poultry industry.

Actions

- Improve poultry disease diagnostic facilities and establish proper disease surveillance plan complying with World Animal Health Organization (WOHA) guidelines
- Improve knowledge and skills on health management system for the workers in the poultry value chain.
- Monitoring and evaluation of existing bio security measures and introduce a certification system.
- Strengthening poultry disease diagnostic facilities at Veterinary Research Institute (VRI), Veterinary Investigation Centers (VICs) and the private laboratories. Establish a strong link between state and private laboratories and relevant regulatory authorities

Policy Objective 3:

To ensure availability of accepted quality and safe poultry feed and feed ingredients at affordable price.

- Promote production of feed local raw materials
- Facilitate import of feed ingredients for poultry feed production when it necessity
- Provide private sector access to lands available for animal feed production
- Efficient utilization of locally available and imported feed raw material
- Improve feed quality and safety standards
- Introduce appropriate novel technologies for feed manufacturing process

Actions

- Facilitate imports of feed ingredients and acceptable feed additives from the world market at globally competitive prices
- Ensure uninterrupted supply of maize and other feed raw materials
- Further strengthening of existing standards for poultry feed and streamline regulatory mechanism under the Animal Feed Act.
- Increase the number of accredited laboratories for animal feed testing.
- Promote production and usage of alternative feed material through applicable farmers
- Establishment of mechanism to generate real time data on economically important feed ingredient production and forecasting through inter institutional network system
- Establishment of an inter-ministerial committee to ensure uninterrupted feed supply to livestock industry

Policy objective 4 :

To facilitate export of poultry, poultry products and poultry by products

Develop the potential of the Poultry industry to competitively engage in the export market

- Improve quality standards of poultry products in conformity with global standards.
- Create export favorable environment.
- Create national level export promotion channel to explore new avenues.

Actions

- Establish internationally recognized accredited National food laboratory for product certification
- Provide tax concessions and rebates
- Identify potential international markets for poultry and value added poultry products
- Promote export oriented value added products.
- Undertake market promotion activities to support private sector exports
- Create disease free export establishments as per the WOAH guidelines.
- Establish new unit in Livestock Ministry in collaboration with Foreign Ministry to facilitate, promote export and explore new avenues linking with national and international counterparts.

Policy objective 5:

To create a business enabling environment for profitable poultry industry.

- Strengthen the existing policies favorably to increase investments and for sustainable growth of the poultry sector
- Introduce insurance system to protect industry in disasters for sustainable poultry
- Promote healthy competition within the industry for fair trade
- Facilitate required infrastructure favorable for the industry

Actions

- Identify gaps in existing trade and investment policies and make necessary suggestions for amendments to reduce policy uncertainty
- Promote local manufacturers to develop new equipment and technologies.
- Facilitate import of quality inputs at globally competitive prices

- Ensure the availability of breeding stocks based on the demand.
- Provide tax concessions and soft loans for poultry industry.

Policy objective 6:

To streamline backyard & alternative poultry production

Streamline backyard poultry production systems to improve family nutrition

- Conservation of indigenous poultry breeds
- Encourage protection of endangered poultry species
- Facilitate family poultry to improve nutrition.
- Ensure bio security and bio safety measure in backyard poultry farming systems
- Ensure monitoring mechanism on local and alternative poultry breeder farms and mini hatcheries.
- Research on identification of favorable genetic traits

Actions

- Develop a mechanism to conserve indigenous poultry breeds
- Strengthening regularization of existing indigenous poultry breeder farms.
- Regularize family poultry to ensure animal and public health.
- Establish standards and enforcement mechanisms for bio security and bio safety measures
- Registration of poultry farms and develop a system to regulate and monitor
- Establish a disease control and monitoring system

Policy objective 7:

To facilitate research and development

Direct R and D activities to improve efficiency, productivity and safety of poultry, poultry products and poultry feed.

Actions

- Promote research on cost effective feed formulation, alternative feed ingredients, farming systems for different climatic conditions, disease monitoring surveillance and diagnostics, productivity improvement, veterinary medicinal products, biological and veterinary

devices, market trends in Poultry sector, new backyard poultry breeds and value added products.

- Encourage collaborative research with government research institutes, universities and private sector.
- Develop a mechanism to disseminate research findings to the industry

Policy objective 8 :

To ensure availability of qualified and trained human resource to provide required service to the poultry industry

- Training of veterinary and other extension staff in public and private sector on poultry farming and related practices.

Actions

- Upgrade course modules of NVQ 5 and 6 comply with poultry sector requirement.
- Develop NVQ 3 and 4 level certification courses for poultry farm workers.
- Facilitate training opportunities for specialized areas of poultry industry for veterinarians and other related officers.
- Conduct Industry based training opportunities (short & long term) with government and private sector involvement
- Continuous capacity building and professional development
- Provide necessary inputs and facilities for service delivery

Policy objective 9 :

To promote environment friendly poultry industry

- Promote responsible use of natural resources
- Maintain minimum level of environmental foot prints.

Actions

- Encourage compliance of environmental regulations and guidelines on poultry industry
- Establish a coordinated mechanism between relevant authorities (DAPH, CEA, MOH, Environmental Police and LG) to maintain environmentally friendly poultry farms.
- Establish standards and guidelines for poultry waste management
- Encourage investments on poultry waste management (eg: rendering, composting and etc.)

- Introduce low cost waste management systems for poultry industry.

Policy objective 10:

To ensure internationally accepted welfare in poultry industry

- Establish poultry welfare standards

Actions

- Establish poultry welfare standards and regulations.
- Establish enforcement mechanism

Policy objective 11:

To increase participation of women and youth in poultry industry

- Maintain the sustainability of the poultry industry with expanded participation of women and youth in all aspects of the poultry industry
- Empower/ Encourage women & youth by providing know-how, financial, and other supportive facilities

Actions

- Provide extension and training on opportunities available in the poultry sector and the latest technology for poultry production for youth and women
- Provide soft loans for women and youth to enter into poultry business.
- Provide women and youth with resources to encourage them in poultry farming.

Policy objective 12:

To establish data management system

Develop a system for data collection, analysis and dissemination

Actions

- Enforce registration of poultry farms and all related establishments in the poultry value chain at Government veterinary office

- Establish a data management system at DAPH to collect all the poultry industry data (Farms, input suppliers, service providers, processors etc.) and publish analyzed information in time to time
- Develop a system to analyze national and international market trends