

## Part 2

# True Cost of Egg Production across five Sub-Saharan African countries

**Sonia Mountford, founder of EATegrity**

**24 March 2025**

# Global trends -

The poultry sector continues to grow and industrialize in many parts of the world. An increasing population, greater purchasing power and urbanization have been strong drivers of growth.

- In the last three decades, world egg production has increased by 150 percent. Much of this growth has been in Asia, where production increased almost fourfold.
- The trend in animal agriculture is to grow more in less space, use cost-efficient feed, and replace labour with technology to the extent possible.
- Poultry is raised by approximately 80 percent of rural households in developing countries.

# Common threads

## Within the 5 countries

Despite various measures taken to alleviate the hunger problem within these countries, food insecurity and undernutrition remain a problem, albeit there is more serious hunger in some.

Government food security policies acknowledge the challenges of rapid urbanization and population growth, but the specific approaches and effectiveness vary significantly across countries.



# Common threads

One of the key similarities is the increasing dominance of intensive systems, particularly in the poultry sector.

Unfortunately, the focus remains on “growing more food”, “more efficiently” and “intensification” of agricultural systems, particularly of livestock systems under the banners green revolution, precision agriculture and climate smart.

Very little is being done to address the systemic problems that face all the countries to some degree: limited infrastructure, lack of affordable food access, lack of nutritional food access, weak economic growth, high inflation, low crop productivity, misguided investments in agriculture, the impact of climate change, and poor policy frameworks.

# Common threads

Uptake of the drive for digitalisation and adoption of Fourth Industrial Revolution (4IR) is common throughout all countries.

*"the "Our prosperity as a nation depends on our ability to take full advantage of rapid technological change. This means that we urgently need to develop our capabilities in the areas of science, technology and innovation."*

Cyril Ramaphosa, 2018

# Common threads

Malawi remains one of the poorest countries in the world and Zambia declared a state of emergency in 2024 due to crippling drought and resulting in severe hunger.

The high debt burden of African governments is leading to painful trade-offs. It is curtailing the fiscal space to invest in development priorities—such as human capital, energy, and transportation—and is raising their vulnerability to shocks—particularly for countries with access to global capital markets and other non-concessional financing sources. As a result, the risk of external debt distress in Sub-Saharan Africa remains high.

# Differences

South Africa has the largest commercial egg sector (dominated by a few integrated corporations) in Africa (except for Nigeria), Zimbabwe's is growing, particularly among small and medium-scale producers and Tanzania, Zambia and Malawi are focused on growing capacity.

Foreign funders, genetic suppliers (breeders) and pharmaceutical suppliers differ between countries.

Consumption of eggs also varies greatly between countries but affordability in relation to the prices of other competing proteins is increasing local consumption of eggs.

# Advisory take-aways

It is important to differentiate between broiler and egg industry when quoting research and data and local research needs to be egg sector focused and careful not to confuse or conflate the two.

The term “intensification” has not been clearly defined within policies.

Agenda 2063 of the African Union, which is seen as Africa's roadmap and grand plan for transforming Africa into a future global superpower, needs further focus on how its adoption of a digitised agriculture sector will impact poultry sector intensification.



# Advisory take-aways

Challenge the government policy of the brazen adoption of technology domination of food systems instead of agroecology and food sovereignty. Begin to recognise the difference between technocratic bandaids vs systemic solutions within food systems and advocate for the development of adequate governance of digital technologies and clear agricultural policies on technology.

*"the promoters of new digital technologies sometimes use this narrative of being indispensable to propel corporate and political agendas and consolidate political and economic power". They emphasise that the promoters of digital technologies might use this transformation to further undermine food sovereignty and peasant agro-ecology (Shimpf, Seufert and Van Dyck, 2023)."*  
Institute for Poverty, Land and Agrarian Studies (PLAAS)

# Advisory take-aways

Keep updated on developments that impact global and cross-border disease control within the poultry industry.

One of the most important SADC projects from a poultry production perspective is the Trans-boundary Animal Diseases (TADs) project. It was implemented in five SADC Member States (Angola, Malawi, Mozambique, Tanzania and Zambia), is designed to strengthen regional institutions in order to identify, diagnose and control the serious socio-economic impacts of trans-boundary animal diseases and to make livestock a tradable commodity. The project is also addressing management of trans- boundary animal diseases, including Newcastle disease and avian influenza.

*FAO and WOAHA released the Global strategy for the prevention and control of high pathogenic avian influenza (2024–2033) under the Global Framework for the Progressive Control of Transboundary Animal Diseases (GF-TADs) on 27 May 2024, on the sidelines of the annual General Session of WOAHA.*

# Advisory take-aways

According to a recent study “Food security is underpinned by well-functioning agri-food systems, which contribute to providing a range of other services, including income security and poverty alleviation, climate change mitigation, nature conservation and gender equality.”

Industry only sees food security as a production objective and to increase production without recognising other aspects of food security. To move the focus beyond a solely production-focused view of food security, it's crucial to recognise and address the four pillars of food security: availability, access, utilization, and stability.

# Advisory take-aways

Understanding the egg sector of each country can be achieved somewhat through a desktop study but internalising the information and using it requires local knowledge and insights. On-the-ground research is important.

Consumers are an important but forgotten leverage as critical enablers of transformation within food systems. Consumer education is very important to grow informed consumers to add their voices for poultry system change.

Media relations. Capacity building to inform journalists. Are we speaking the right media language?

# Advisory take-aways

## **The potential of informed collaboration**

For strategic grassroots action on the ground in African countries

Funder focus vs local insights and experience

Unique country vs “copy & paste” strategies

Shared campaign challenges

Sharing positive and negative experiences

# Advisory take-aways

## **Growing strategic partners - African-centric opportunities**

Understanding the untapped potential in partnering with other food system focus groups such as food sovereignty, agroecological, indigenous or small scale producers, grassroots groups

Mapping support opportunities

Further co-research opportunities

Amplifying smallscale egg farmers voices & narratives

Tapping into existing campaigns with shared visions

# Thank you

*Hens don't have a voice, but we do.*



Additional References:

Dutchman Univent Image source is <https://www.bigdutchman.com/en/products/egg-production/poultry-cages/univent/>  
[University Johannesburg, Centre for Competition, Regulation and Economic Development, Sumayya Goga and Simon Roberts. Multinationals and competition in poultry value chains in South Africa, Zambia, and Malawi, August 2023, found at [https://www.researchgate.net/publication/375864070\\_Multinationals\\_and\\_competition\\_in\\_poultry\\_value\\_chains\\_in\\_South\\_Africa\\_Zambia\\_and\\_Malawi\\_About\\_the\\_authors](https://www.researchgate.net/publication/375864070_Multinationals_and_competition_in_poultry_value_chains_in_South_Africa_Zambia_and_Malawi_About_the_authors)

Nalwimba, N. 2024. "Digital Technology in Zambian Agriculture: A Scoping Report.  
" Working Paper 66. Cape Town: Institute for Poverty, Land and Agrarian Studies, University of the Western Cape, South Africa