

Ministry Paper /2014

Small Stock Industry

1.0 Purpose

The matter for Tabling is an update on Initiative being undertaken for Small Stock Industry (includes goat, sheep and pigs)

2.0 Sheep and Goats

2.1 The small ruminant industry continues to play an important economic and nutritional role in Jamaican small farming systems, with goat meat being the more popular. Large quantities of chevron and mutton are being imported to satisfy local demand which exists primarily in the hospitality sector. Hence, increasing the production of these commodities continues to be among the top priorities of the Government of Jamaica's food security and import bill reduction strategy. Currently, production from the sector accounts for only 15 % of total mutton and chevron consumption locally while the remaining 85 % is derived from imports, mainly from Australia, New Zealand and the United States of America.

2.2 The most recent surveys have shown that between 2007 and 2011, the sheep population increased by 17%, while the goat population saw significant increases of up to 45% moving from a total of 482,345 in 2007 to approximately 700,000 in 2011. Despite these positive movements, however, Jamaica still imports over 4,600 MT of sheep and goat meat in 2012 valued at over US\$21million indicating that there is still a great void to be filled by local production. **Table 1** details the quantities of mutton and lamb imported versus the local production.

The sheep industry in Jamaica is recognised as one with enormous potential based on market demand assumed from quantities of mutton and lamb imported and consumed by the local households, restaurants and tourism market. In 2009, some 2591 MT of lamb and mutton valued at US\$8.4 million were imported, while production during the same period stood at only 15 MT. There was thus a difference of 2,576 MT which presents an opportunity for local farmers to expand production and generate income.

Table 1a Quantity of mutton and lamb – imports (MT) and value (US\$ M), production (MT)

	2006	2007	2008	2009	2010*
Imports – mutton and lamb					
Mutton	4,195	3,431	4,257	2,159	2,255
Lamb	646	2,775	640	432	207
TOTAL	4,841	6,207	4,897	2,591	2,462
Value of imports					
Mutton	10.1	7.9	11.8	7.3	10.0
Lamb	1.6	1.7	1.8	1.1	1.0
TOTAL	11.7	9.6	13.6	8.4	11.0
Production - sheep					
No. slaughtered	498	541	1,877	805	400
Total weight	8	10	26	17	11
Dress weight	7	8	22	15	9
Production deficit	4,834	6,199	4,875	2,576	2,453

*2010 production

Table 1 b. Sheep population in Jamaica (2009/2010 & 2010/2011)

Category	No. Sheep	
	2009/2010	2010/2011
Mature Ewes	4,662	5,653
Ewe Lambs	871	1,297
Ram Lambs	809	1,008
Wethers	150	200
Service Rams	96	138
TOTAL	6,588	8,296

Source; Agro Investment Corporation, Ministry of Agriculture & Fisheries, Jamaica, 2012

2.3 Initiatives

The Common Fund for Commodities is currently funding a project entitled *Diversification of the Caribbean Livestock Sector through the Production of Small Ruminants*. The project executing agency is CARDI while the Ministry of Agriculture and Fisheries Research and Development

Division is the implementing agency. The Project started in January 2012 with duration of 4 years at a total cost of US\$4.031 Million with a grant financing of US\$ 1.428 Million

This small ruminant project is based upon developing the best quality product through breeding and capacity building along the small ruminant industry development chain which includes livestock quality, producer capacity building, meat production as well as processing and by-product utilization.

The Objectives of the project are;

- To improve the productivity and quality of meat (raw and processed) and the volume and value of the marketable off-take of small ruminants livestock in the targeted countries.
- To enhance the income and food security of small scale mutton and chevon farmers, attaining, by the end of the project cycle, an additional 25% of the local demand for small ruminant meat in Jamaica and Trinidad & Tobago.
- To promote domestic production/consumption
- To encouraging import substitution of meat products
- Sustainable development of the Small Ruminant sector

The project is being undertaken through four (4) components;

- **Component A Breed Improvement & Dissemination of Stock:** To improve the quality, quantity and availability of small ruminants in the region
- **Component B Technology Transfer & Capacity Building:** To facilitate the dissemination of knowledge and diffusion of technology to relevant stakeholders
- **Component C Small Ruminant Production:** To improve food and nutrition security in the CARICOM Region through the increased production of small ruminants, milk & processed products
- **Component D Marketing and Processing:** To improve the marketing channels and processing options so as to ensure maximum value to the producers and consumers

Achievements of the Project to date

- 136 of the 244 targeted animals have been procured (58 Imported and 78 from Local Stock)
- A total of 62 lambs and kids have been produced to date through the breeding programme
- A forage-based feed delivery system is being developed at the project site at Hounslow Research Station with the establishment of 5.5 ha of fodder banks (Sorghum, Mulberry, Leucena) and 15 ha of pasture Pangola (*Digitariadecumbens*) for grazing.
- Purchase of farm machinery, tools and equipment to enhance the husbandry and feeding systems including Tractor, Posthole auger, Forage harvester, Irrigation system, Disc plough, Brush cutter and Fertilizer spreader
- Renovation to animal shelter at Hounslow
- Housing, classroom and dormitories to facilitate the training activities were completed
- Curriculum developed and courses commenced for the Training-of- Trainers (15 Officers from RADA and the VSD were engaged in a resident training programme)
- Training curriculum developed for producers
- Terms of reference developed and persons/organizations invited to the National Coordinating Committee (NCC) which was established to guide, evaluate and monitor the project

3.0 Pig Industry

3.1 Pig rearing in Jamaica provides an income generating activity for entrepreneurs and employs approximately 5,670 farmers and based on the Food & Agricultural Organization multiplier factor of 3.2, indirect employment of approximately 18,000 or roughly 1.6% of the total workforce.

3.2 The pig industry has recorded improvements in the size of its population and also in structural changes required for its growth. A Pig/Pork Industry Census and Value Chain Study conducted in 2012, indicated that the pig population was approximately 145,000 animals in 2012, compared to 142,000 in 2003. Importantly, it revealed a positive change in the structure of herds as the average size of pig herds increased by 29% when compared to 1998.

Additionally, the findings revealed that 53.4% of the pig population is now owned by larger farmers with 50 or more pigs compared to 44.2% in 1998. While the pig population has moved by only 2%, over period 2003 to 2012, the output of pork has grown by 41% (3.5 M. kg in 2003 compared to 4.95 M. kg. in 2012).

3.3 Significant work has been undertaken in terms of the genetic improvement of the pig stock. The improved genetics resulted in an increase in dressed weight of fatteners being sold to butcher by 21 percent moving from 54.6 kg in 2003 to 66 kg in 2012. Additionally, this has resulted in improvement in the value chain as packers and processors experienced an increase in dressed weight of 84% over the same period.

3.4 It should be noted that intensive policy support was a measure used to effect the changes outlined. Over the past ten years Jamaica relied heavily on imports of hams. However with the direct policy intervention to utilize local pork shoulders and legs in the production of picnic and leg hams, Jamaica's reliance on imports over the two year period 2012 to 2013 reduced significantly. This policy support has also resulted in a reduction in total pork imports over the last three years (2011-2013).

Pork Imports (2011-2013)

Year	Kg.	US\$	J\$
2011	3,169,568 (r)	9,070,970	779,396,172
2012	2,289,423 (r)	6,701,952	588,688,645
2013	2,057,240 (p)	6,622,931	664,453,325

R- Revised P- Preliminary

It should be noted that close examination of the import figures reveal that it mainly comprises bellies which is used for the production of bacon as Jamaica is not able to produce enough to meet the current demand. Total imports over the period 2011-2013 has been reduced by 35% in weight (kg) and by 27% in value (US\$).

4.0 Abattoir Development Programme

In 2010, the MOAF commissioned a study on the status of abattoirs in the country. This was followed in 2013 by a Final Report on a "Strategic Planning Framework for the Abattoir Meat Science System in Jamaica". The Terms of Reference called for the development of a Strategic Implementation Plan for an Abattoir Meat Science System. The foundation for such a system is

the Codex Alimentarius – Good Hygiene Practices for Meat and the OIE Animal Health Code for Terrestrial Animals.

The objective was to identify existing places of slaughter, determine their condition and relevance in terms of functional location as well as potential for upgrade in compliance with food safety standards. An assessment of the slaughter facilities revealed that the vast majority of these facilities cannot meet the minimum international standards required as specified in the Code of Hygiene practices for meat. In some instances even where it may have been possible to upgrade such facilities to meet minimum standards, the locations are inappropriate and would not be able to meet local environmental and planning requirements. There were seven privately operated facilities which were already meeting the minimum basic standards and can be further upgraded to ensure full compliance.

The 2010 Study recommended the establishment of four regional state-of-the-art facilities strategically located in the parishes of St James, St. Elizabeth, St. Catherine and St. Ann at a cost of \$US 5.9 million. The MOAF under its agro park concept is seeking through a Public Private Partnership Arrangement to support the establishment of a multi-species abattoir in financial year 2014/2015. (See Ministry Paper on Food Safety)

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