

Voluntary Report – Voluntary - Public Distribution

Date: March 28, 2023

Report Number: GH2023-0003

Report Name: Ghana Livestock Voluntary 2023

Country: Ghana

Post: Accra

Report Category: Livestock and Products, Agricultural Situation, Agriculture in the Economy

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Report Highlights:

Traditionally, Ghana's livestock sector mainly comprises cattle (for beef), sheep, goats, pigs (hogs), and poultry enterprises. Rabbits, guinea pigs, grasscutters or cane rats (domesticated breeds), and African giant snails are also kept and promoted as non-traditional livestock in Ghana. Though relatively small, livestock production constitutes an essential component of Ghana's agricultural economy. Post forecasts reduction in MY2023 domestic livestock populations mainly due to high maintenance costs in recent times.

General Information

Production

Livestock production in Ghana is mainly done under three husbandry systems; animals are raised under extensive, semi-intensive and/or intensive systems, usually corresponding to low, moderate, and high capital requirements respectively. The extensive system is the commonest method, mostly favored by small ruminant farmers in rural communities. Animals raised under this system have the freedom to roam outdoors and have some autonomy over diet selection (through grazing), water consumption and access to shelter. It is sometimes referred to as the free-range system of animal husbandry.

The semi-intensive system is mostly favored by those involved with cattle rearing. The animals are usually housed in an inexpensive structure as shelter during the evenings and nights and allowed to roam and graze in the open during the day under the supervision of a herdsman. The intensive system is usually restricted to commercial poultry and piggery ventures. Under this system, animals are in confinement and are fully dependent on humans to provide for basic animal needs such as food, shelter, and water daily.

Traditionally, Ghana's livestock sector mainly comprises cattle (for beef)¹, sheep, goats, pigs (hogs), and poultry enterprises. Rabbits, guinea pigs, grasscutters or cane rats (domesticated breeds), and African giant snails are also kept and promoted as non-traditional livestock in Ghana. The poultry sub-sector is the most developed in terms modernized husbandry and value addition approach to production, followed by the hog production sub-sector. Cattle, sheep, and goat production are largely done either under the semi-intensive or extensive systems.

Though relatively small, livestock production constitutes an essential component of Ghana's agricultural economy. Its contribution is not limited to food but includes multipurpose uses, such as production of hides/skins, manure, capital accumulation, etc. Livestock also plays an important role in the social and cultural lives of millions of farmers for whom animal ownership serves as a major source of income. The contribution of the livestock subsector to the agricultural GDP of Ghana has witnessed a gradual decline over the years; from 12.60 percent in CY2014 to 8.31 percent in CY2020.

Post forecasts MY2023 domestic live cattle population at 2 million head, representing about 8 percent decrease compared to the preceding years estimate of about 2.2 million head. The reduction is largely due to the increased slaughter numbers as some producers seek to cut their losses in terms of high maintenance costs in recent years.

Sheep and goat populations in MY2023 have been forecast at 5.5 million and 8 million respectively by Post, corresponding to decreases of about 3 percent and 2 percent respectively, with respect to the MY2022 numbers. Like cattle production, the reason for the expected decline in the sheep population is mainly due to farmers opting to cut down their losses from high maintenance cost in terms of veterinary drugs. In the case of goat production, however, the decrease in population is due to increase in slaughter resulting from high consumption demand.

¹ Cattle production in Ghana is purposely for meat. Exclusive dairy farming is very rare. Go to https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=An%20Overview%20of%20Ghana%27s%20Dairy%20Industry_Accra_Ghana_GH2022-0011 for more information on Ghana's dairy sector.

Table 1: Trend of Livestock Population ('000)

Type of Livestock	Cattle	Sheep	Goat	Pig	Poultry
2011	1,498	3,887	5,137	568	52,575
2012	1,543	4,019	5,435	602	57,885
2013	1,590	4,156	5,751	638	63,732
2014	1,657	4,335	6,044	682	68,511
2015	1,734	4,522	6,352	730	71,594
2016	1,815	4,744	6,740	777	73,885
2017	1,901	4,978	7,151	816	75,363
2018	1,943	5,102	7,366	845	76,870
2019	2,032	5,333	7,764	894	79,391
2020	2,109	5,544	8,180	946	81,769

Source: SRID/MOFA Projections (2020)

Table 2: Live Animal Imports by Species per Year (Numbers)

Year	Cattle	Sheep	Goat	Total
2011	9,384	2,835	2,495	14,714
2012	23,622	9,840	10,008	43,470
2013	21,131	16,738	16,953	54,822
2014	20,948	22,188	32,012	75,148
2015	17,968	15,763	20,004	53,735
2016	23,575	13,854	16,900	54,329
2017	32,249	47,526	46,665	126,440
2018	52,948	55,602	84,751	193,301
2019	69,083	48,799	103,201	221,083
2020	42,838	68,656	72,606	184,100

Source: Veterinary Services Directorate, MOFA, Accra (2020) *SRID, MOFA, (Computed)

Table 3: Imports of Animal Feed (MT)

Animal Feed	2016	2017	2018	2019	2020
Fishmeal	228.67	848.24	-	2,754.00	54,629.72
Premix	1,571.64	2,017.82	15,669.71	8,701.00	N/A
Concentrate	9,482.75	13,275.26	100,410.20	111,325.70	32,910.29
Soybean	38,374.75	45,329.11	292,482.20	43,498.10	64,652.40
Peanut cake	-	-	-	132	-
Copra cake	33,472.82	-	-	-	-
Corn (yellow)	-	8,496.44	150,196.00	-	-
Total	83,130.63	69,966.87	558,758.23	166,411.00	152,192.41

Source: Animal Production Directorate, MOFA

Table 4: Livestock Slaughter Summary per Year (Numbers)

Type of Livestock	Cattle	Sheep	Goat	Pig	Other*	Total (All Livestock)
2011	202,104	73,159	108,826	20,086	3,705	407,880
2012	220,446	90,656	140,914	23,608	5,521	481,145
2013	200,819	68,344	118,623	24,062	2,824	414,672
2014	164,554	64,594	129,073	21,735	4,102	384,058
2015	141,144	47,546	76,531	13,618	3,045	281,884
2016	116,056	42,138	67,390	11,923	5,513	243,020
2017	129,694	47,960	74,101	13,195	4,746	269,696
2018	122,083	49,291	78,366	15,648	2,130	267,518
2019	122,802	49,526	86,313	16,481	1,043	276,165
2020	121,863	50,312	88,372	20,785	3,722	285,054

Source: Veterinary Services Directorate, MOFA, Accra (2020)

*Include dogs, donkeys, grasscutters (cane rats), rabbits, guinea pigs, and African giant snails.

Table 5: Domestic Meat Production per Year (MT)

Type of Livestock	Cattle	Sheep	Goats	Pigs	Poultry	Total
2011	20,592	17,491	20,341	19,072	41,008	118,504
2012	21,221	18,087	21,198	20,224	46,308	127,038
2013	21,863	18,703	22,429	21,432	50,985	135,412
2014	22,781	19,507	23,573	22,932	54,809	143,603
2015	23,841	20,347	24,774	24,513	57,276	150,751
2016	24,961	21,349	26,285	26,107	59,108	157,810
2017	26,134	22,399	27,889	27,412	60,291	164,124
2018	26,716	22,959	28,727	28,392	61,496	168,291
2019	27,936	23,999	30,278	30,025	63,513	175,751
2020	28,999	24,948	31,902	31,786	65,415	183,050

Source: SRID (2020)

Table 6: Criteria for Estimating Domestic Meat Production

Livestock	Off Take Rate (%)	Average Live Weight (kg)	Carcass Rate (%)	Carcass Wt. of Animal (kg)
Cattle	11	250	50	125
Sheep	30	25	60	15
Goats	30	22	60	13
Pigs	80	60	70	42
Poultry	80	1.3	75	1

Source: SRID Estimations

Criteria: meat production (MT) = (Off Take Rate (%) × estimated population × carcass-weight of animal (kg))/1000

Carcass Weight = Average Live Weight (kg) × Carcass Rate (%)

Table 7: Quantity of Frozen Meat Imports by Category (MT)

Meat Category	2016	2017	2018	2019	2020
Poultry*	100,477	151,346	204,755	153,448	148,118
Pork (Swine)	9,480	5,748	3,082	2,914	3,559
Bovine (Cattle)	24,682	28,913	30,440	18,931	37,026
Small Ruminants (Sheep + Goat)	5,136	3,685	3,541	2,041	3,844
Total (All Category)	139,775	189,692	241,818	177,334	192,546

Source: Ghana Statistical Service (GSS)

*Poultry: chicken accounts for over 97%, turkey meat - 2.9%, Other (ducks, geese, guinea fowl) - 0.03%.

Consumption

Animal production in Ghana (cattle, sheep, goat, and hogs) has remained low and is dominated by smallholder farmers with average animal populations of less than 50 head. According to industry analysts, Ghana imports more than 90 percent of its consumption requirements of livestock and livestock products.

With a growing population, an expanding middle-class, and fast-developing hospitality industry, consumption demand for livestock and livestock products is expected to increase. This represents trade opportunity for U.S. exporters of swine and bovine meat, livestock genetics and breeding stock, and feed.

Table 8: Imports of Meat in Metric Tons (MT) Carcass-Weight Equivalent (CWE)

Type of Meat	2018	2019	2020	2021	2022
Swine meat	3,571.36	2,537.50	3,776.98	3,690.26	1,159.32
Bovine meat	18,308.06	24,038.4	25,437.89	25,797.34	9,179.85
Total	21,879.42	26,575.90	29,214.87	29,487.60	10,339.17

Source: computed from Trade Data Monitor LLC, 2023 data by FAS Accra

Marketing

Most imported meats (beef/veal, lamb, pork) on the Ghanaian market are sold frozen. Imported fresh or chilled meat is restricted to the modern retail outlets with good cold storage facilities, where cuts are made and sold by weight according to the consumer's desire. Traditional open markets offer fresh meat sourced from local slaughterhouses and individual livestock owners. Currently, a kilogram of fresh beef sells at GH¢55.00 (\$4.58), fresh lamb of same weight sells at GH¢66.00 (\$5.50), and a kilogram of fresh goat sells at GH¢66.00 (\$5.50). A kilogram of fresh pork sells at GH¢70.00 (\$5.83).

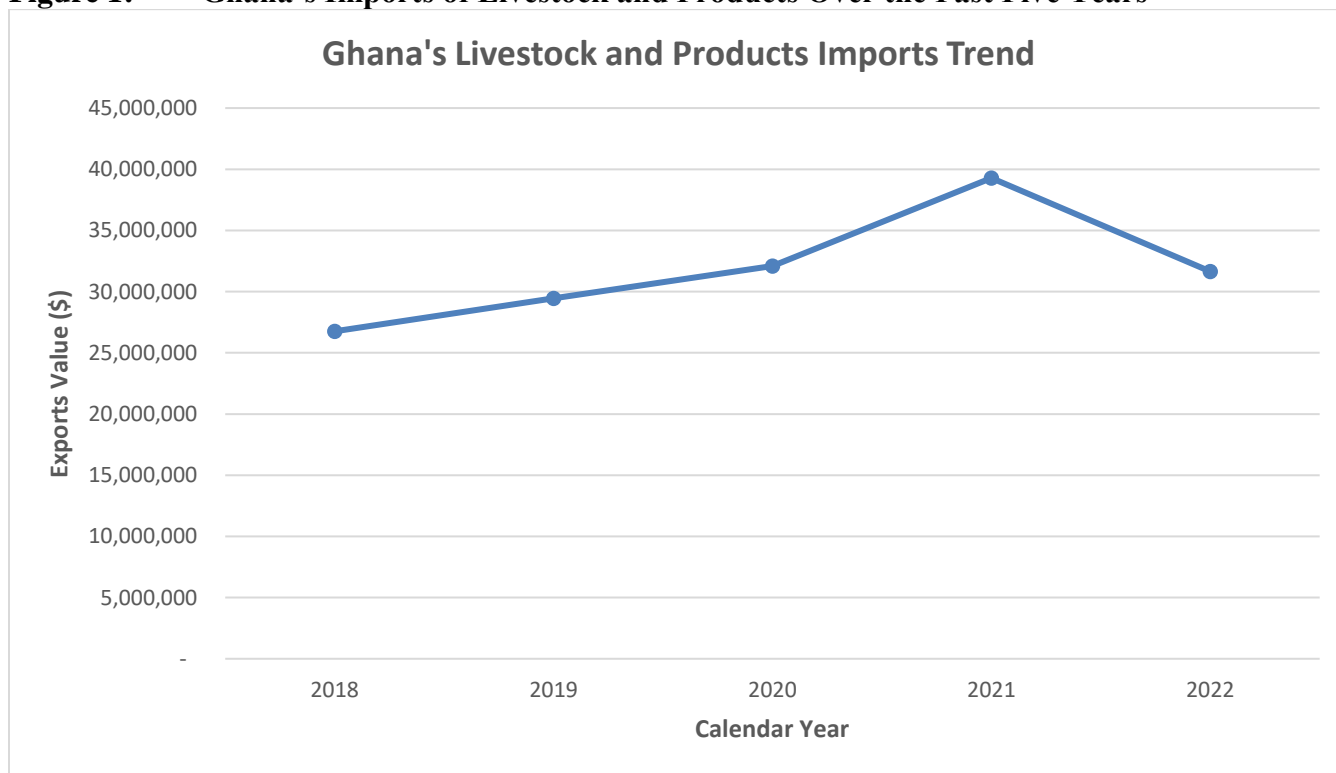
Goat meat is preferred to lamb by many Ghanaian consumers but consumers that patronize the open market and some public slaughterhouses are often sold lamb passed off as goat meat.

Live animals are especially sought out for occasions such as religious and cultural festivities, as well as during social gatherings for events like marriages, naming ceremonies, funerals, and club parties. Average price of a live bull of about 250 kg is GH¢9,000.00 (\$750.00), and a live boar of about 60 kg sells at GH¢2,200.00 (\$183.33). likewise, a live ram weighing about 25 kg sells at GH¢1,800.00 (\$150.00), and a live billy goat of about 22 kg also sells at GH¢1,800.00 (\$150.00). (*Average Exchange Rate: USD1.00=GHS 12.00*)

Trade

The total market size of the Ghanaian livestock and products industry (cattle, sheep, swine, beef, lamb, and pork), excluding poultry and poultry products was estimated at \$39 million in CY2021. Post estimates Ghana’s MY2023 beef/veal and pork imports at 15,000 MT CWE, nearly a 45 percent increase over the MY2022 volume of imports. This is based on the expectation that a bailout from the IMF will be secured by the end of the second quarter of CY2023. Also, domestic production is expected to continue the downward trend due to higher input prices.

Figure 1: Ghana’s Imports of Livestock and Products Over the Past Five Years



Source: Trade Data Monitor LLC, 2023

Meat (mainly beef, lamb, and pork) is largely imported from South America and Europe, but a significant amount is sourced from South Africa. However, Burkina Faso is Ghana’s leading trade partner regarding live animals (cattle, sheep, and goats).

Table 9: Top 10 Exporting Countries of Livestock and Products to Ghana, USD

Trade Partner	2018	2019	2020	2021	2022
Paraguay	0	223,759	218,981	196,636	7,093,133
Ireland	4,071,208	2,042,175	2,915,018	1,424,220	4,907,501
Brazil	3,237,074	4,946,661	5,888,804	8,262,232	4,370,812
UK	1,652,431	1,627,786	2,354,569	3,126,451	3,177,115
Netherlands	2,871,207	12,860,430	12,474,214	13,259,969	2,999,949
Belgium	5,252,896	751,734	935,243	2,373,414	2,238,085
Poland	633,543	651,444	1,595,183	1,657,843	1,367,873
Germany	668,370	631,495	239,153	308,488	615,209
Italy	1,173,757	1,204,514	1,413,547	2,411,838	465,649
Spain	444,606	456,352	389,521	638,763	409,218
Others	6,753,360	4,063,691	3,681,305	5,622,012	3,997,326
Total	26,758,452	29,460,041	32,105,538	39,281,866	31,641,870

Source: Trade Data Monitor LLC, 2023

Policy

The livestock and products import agreement between Ghana and the United States was revised in January 2023 to officially grant market access to U.S. exports of pork and pork products in addition to other meat products from the United States. Follow the link below for more information on the revised import agreement:

<https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Ghana%20Officially%20Opens%20its%20Market%20to%20US%20Pork%20and%20Pork%20Products%20Export%20Accra%20Ghana%20GH2023-0001>

Though not heavily regulated like chicken imports, which require an import permit, import of various meats (beef, lamb, and pork) also attract a high import tariff of 35 percent import duty. Additional taxes and levies are as follows:

- VAT - 15.0 percent
- ECOWAS levy - 0.5 percent
- Export Development and Investment Fund (EDIF) levy - 0.5 percent
- Inspection fee - 1.0 percent
- Integrated Customs Management System (ICUMS) service charge - 0.75% of FOB value.
- National Health Insurance Levy - 2.5 percent, to be collected by the VAT Secretariat.

Rearing for Food and Jobs (RFJ) Initiative

As one of the five modules under the Government of Ghana's flagship agricultural program dubbed Planting for Food and Jobs (PFJ), the RFJ was launched in 2019 under the theme "Self-Sufficiency in Meat Production - a Must," with the goal of revamping the livestock sub-sector of the agricultural economy. The RFJ initiative seeks to modernize and transform agriculture for food, jobs, and foreign exchange through the rearing of livestock such as poultry, cattle, sheep, goats, and hogs, among others. The program remains underfunded. And the greatest attention and support under the initiative have mainly gone to the poultry industry, which has the largest number of producers.

End of report.

Attachments:

No Attachments.