

Community Action in Integrated and Market Oriented Feed-Livestock Production in Central and South Asia

Marketing chains of sheep meat and lambs in Tajikistan

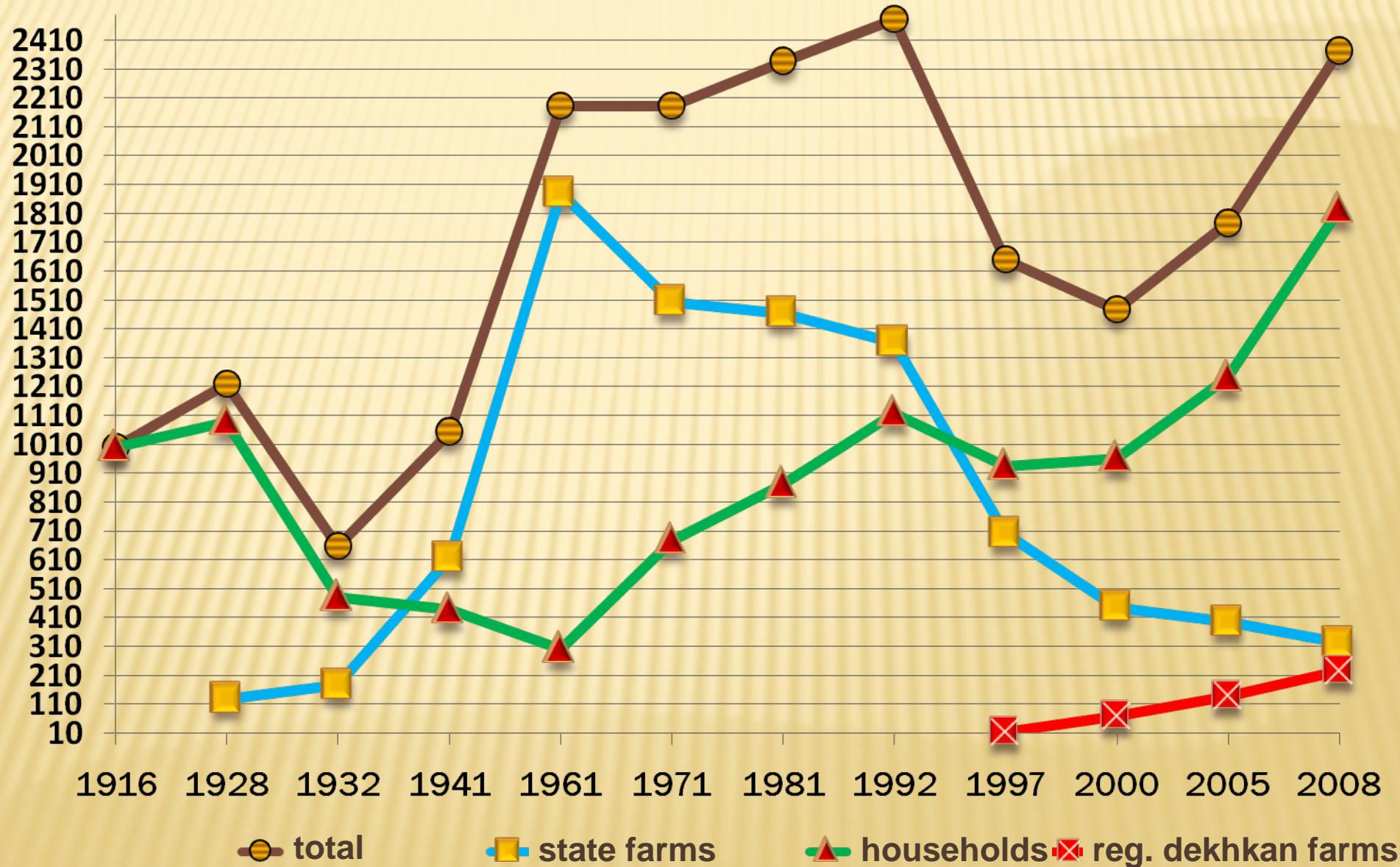
Gulomkodir Safaraliev

Principal Investigator on Socioeconomics,
project site near Dushanbe

Farm types in Tajikistan

- I. State agricultural enterprises
- II. Registered dekhkan farms (ДФХ)
- III. Household farms

Dynamics of the sheep flock in Tajikistan for 1916 - 2008



The number of agricultural animals per household in Tajikistan for 1928 and 2008

Year	Types of agricultural animals (heads)				
	horses	cattle	sheep	goats	donkeys
By 1928	0.5	2.6	6.6	4.4	0.7
As of 01.01.2008	0.1	2.2	3.1	1.9	0.2

Average annual per capita production and consumption of livestock products in Tajikistan

Year	1991	1996	2000	2006	2007
Product					
Production					
Meat, kg per annum (after slaughtering)	26.9	7.8	4.8	8.0	8.2
Milk, kg per annum	104.9	29.8	50.6	77.5	80.9
Eggs, pcs per annum	81.1	1.0	3.8	15	15.4
Consumption					
Meat, kg per annum	26.1	7.0	5.4	9.6	10.8
Milk, kg per annum	171	50.4	64.9	82.0	98.0
Eggs, pcs per annum	88	11	19	24	24

Marketing chains of sheep meat and lambs



Methodology of the research on marketing of sheep meat and lambs

➤ **Period and place of conducting**

- monthly, from June 2006 up to May 2008
- 7 livestock markets, about 35 trade outlets (shops, meat stalls, and food markets) in Dushanbe and 4 nearby districts
- weekly, from June 2008 up to now
- 4 markets and 40 trade outlets

➤ **Studied indicators**

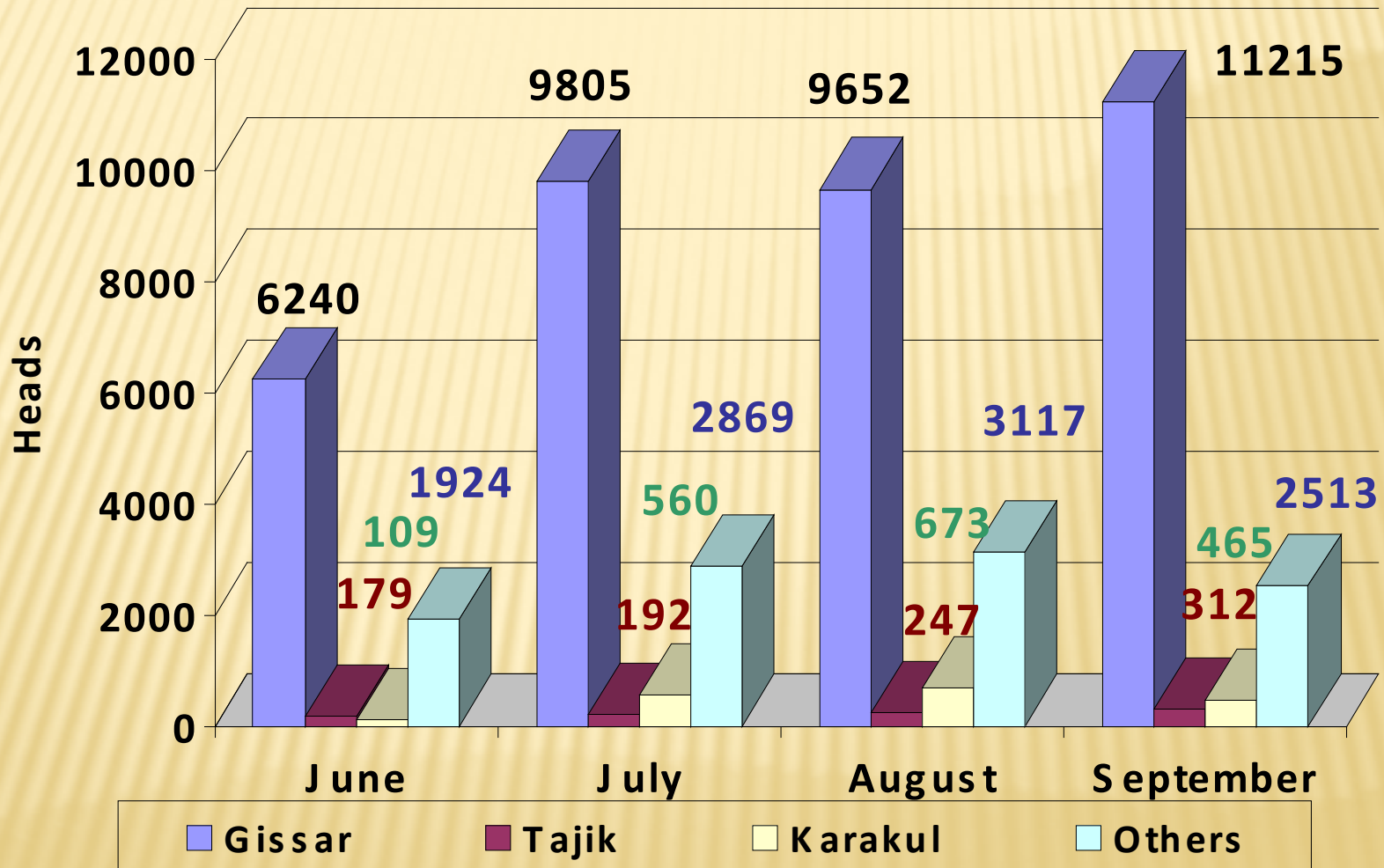
- farm gate prices
- transportation costs
- wholesale prices in trade outlets
- retail prices of butchers

Methodology of lamb marketing chain study

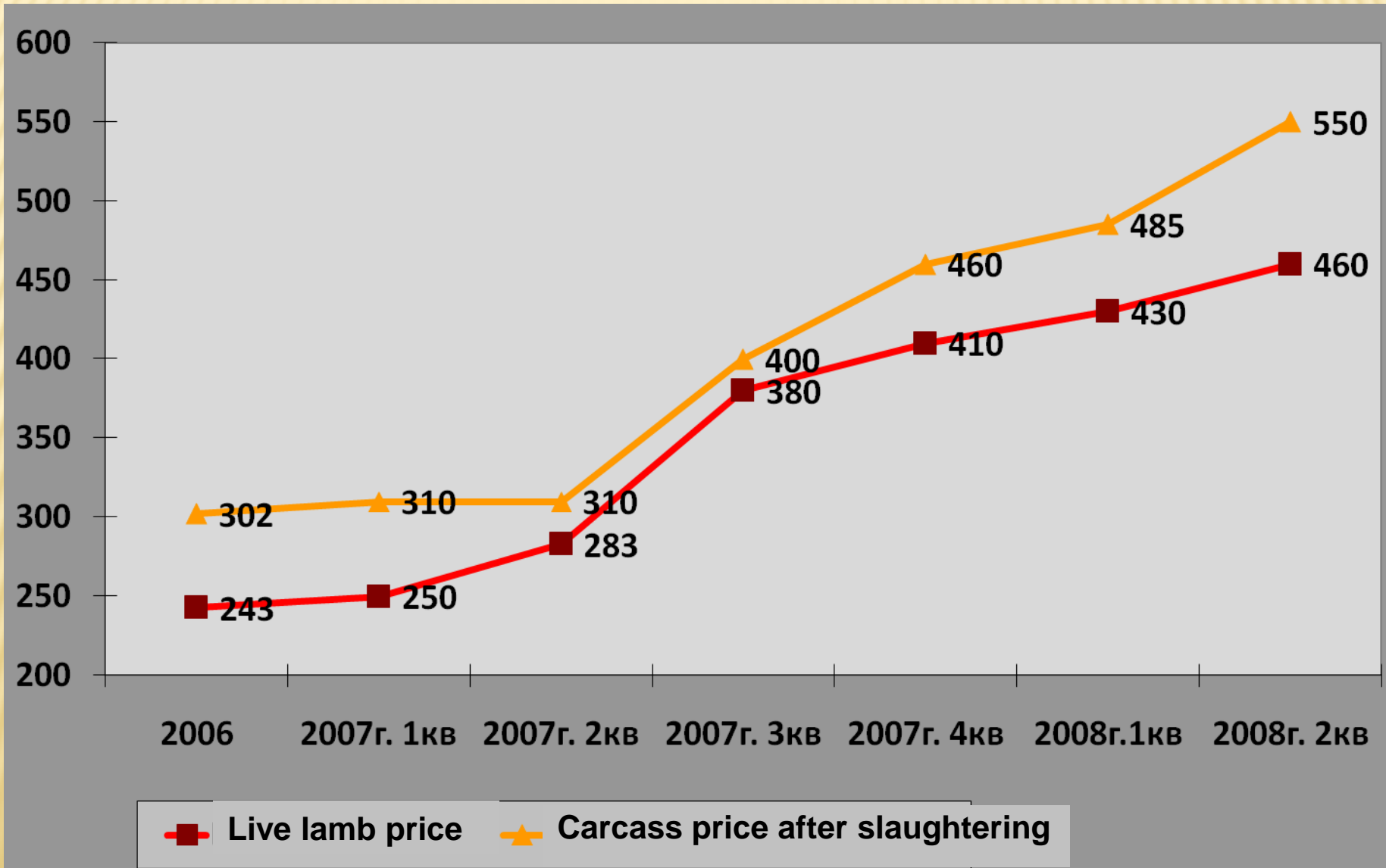
➤ **Selected indicators:**

- the number of agents at the market;
- the number of sheep, their breed structure, market share, sex and age;
- market prices for different sex and age groups;
- geography of lamb supply to markets by seasons;
- market fees and other livestock marketing costs;
- market infrastructure and services;
- major factors of lamb price change

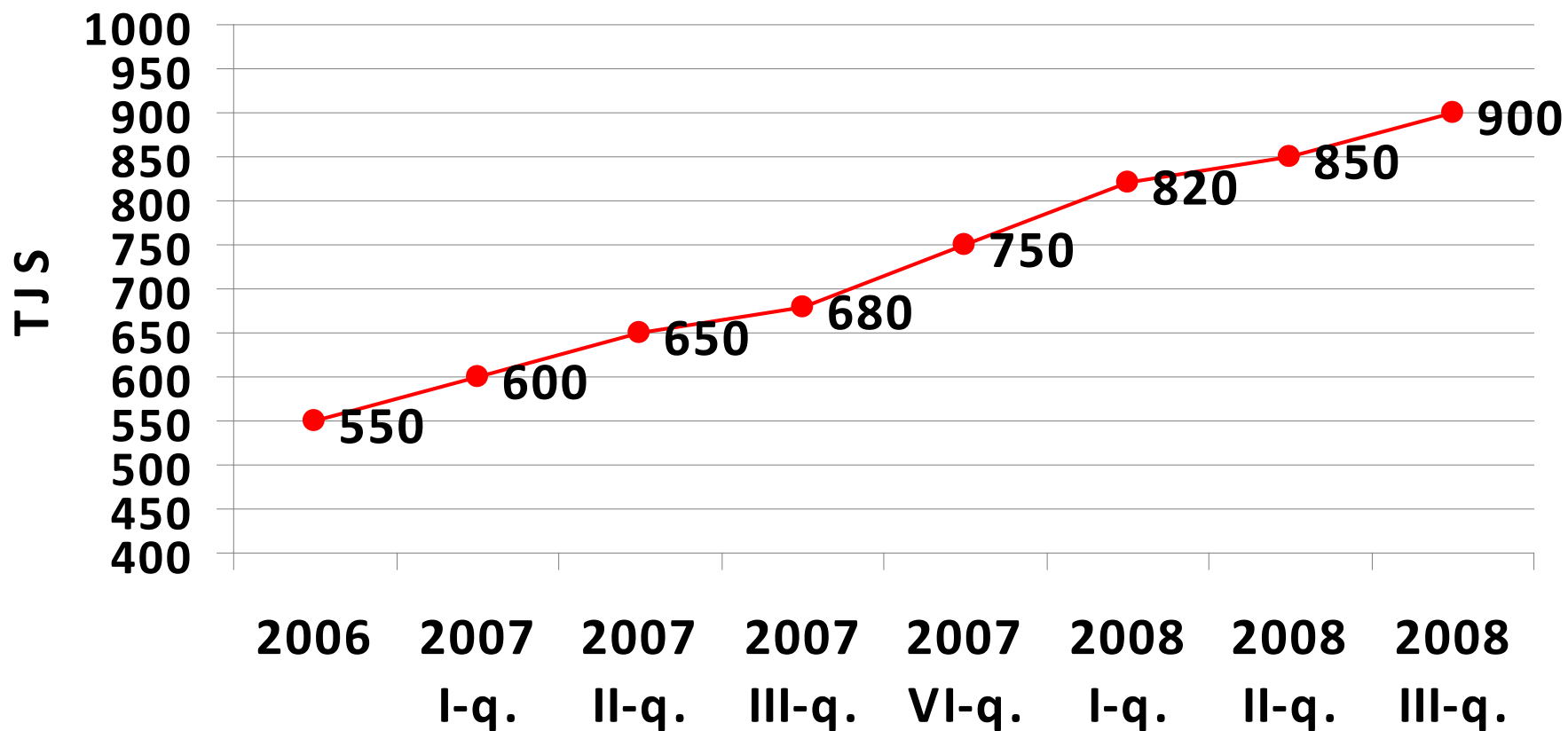
Breed distribution of sheep sold at the markets



Dynamics of price per lamb with a live weight of 50-55 kg (Tajik Somoni)



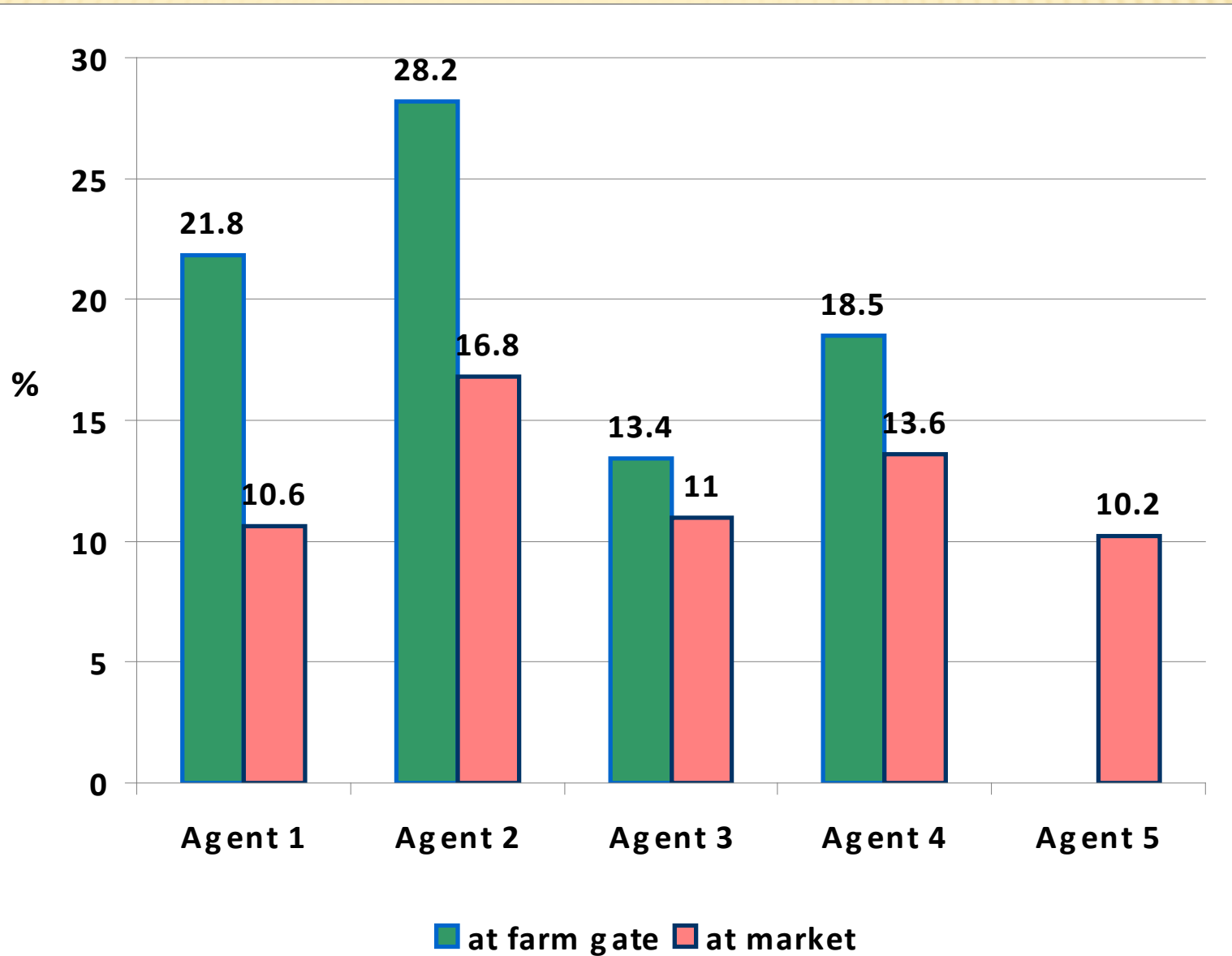
Average price of the fattened Gissar ram



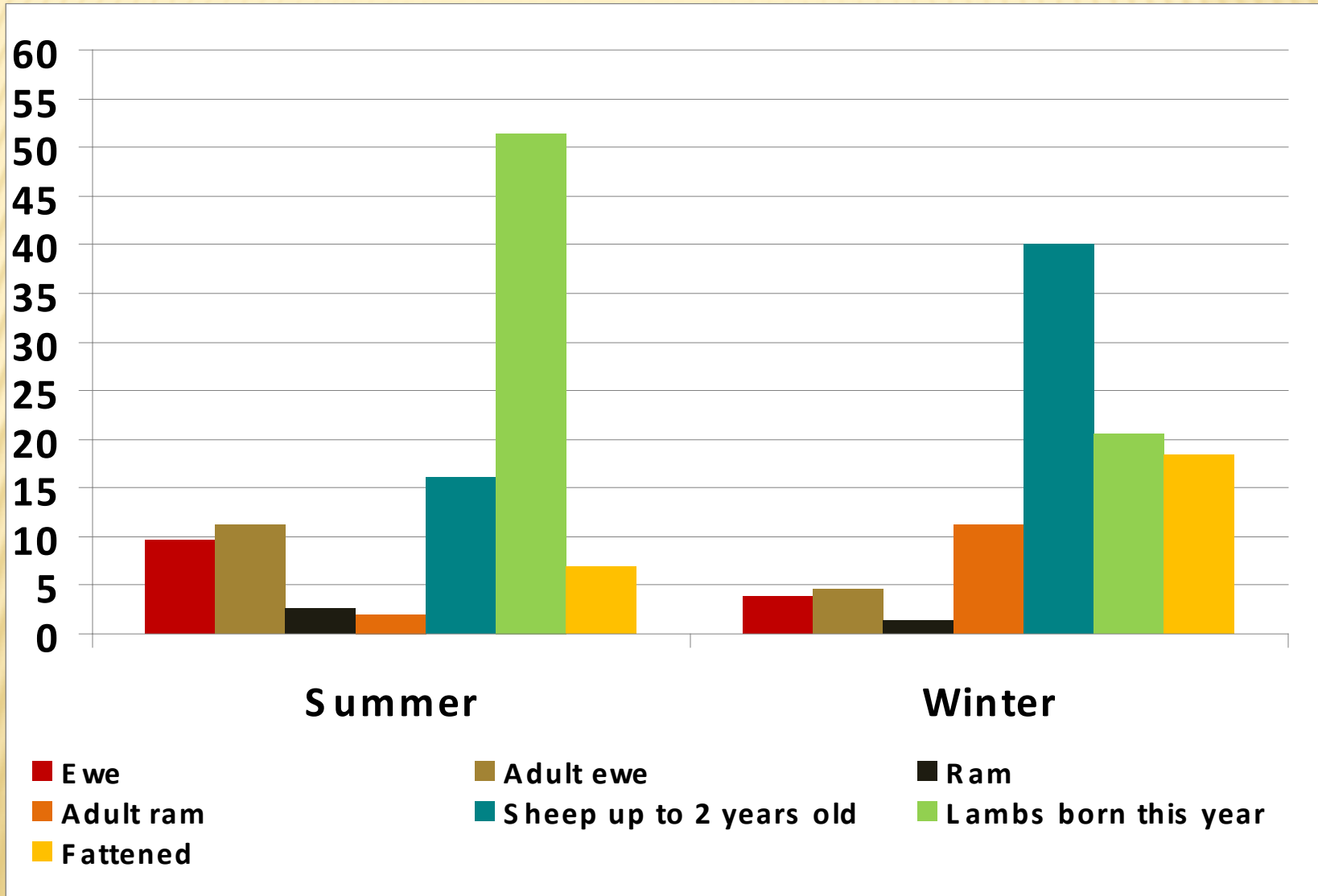
Major agents at livestock markets of Dushanbe and Vakhdat

#	Name	Activities
1	Wholesale buyers	Procurement – fattening – selling of a live animal
2	Butchers	Procurement – keeping – selling of meat and fat
3	Wholesale buyer from remote area (180 – 350 km)	Wholesale procurement – transportation – selling of a live animal
4	Regional suppliers	Procurement – transportation – selling to a middleman
5	Resellers	Procurement – selling later at the same market

Share of the profit obtained by different agents from selling of sheep



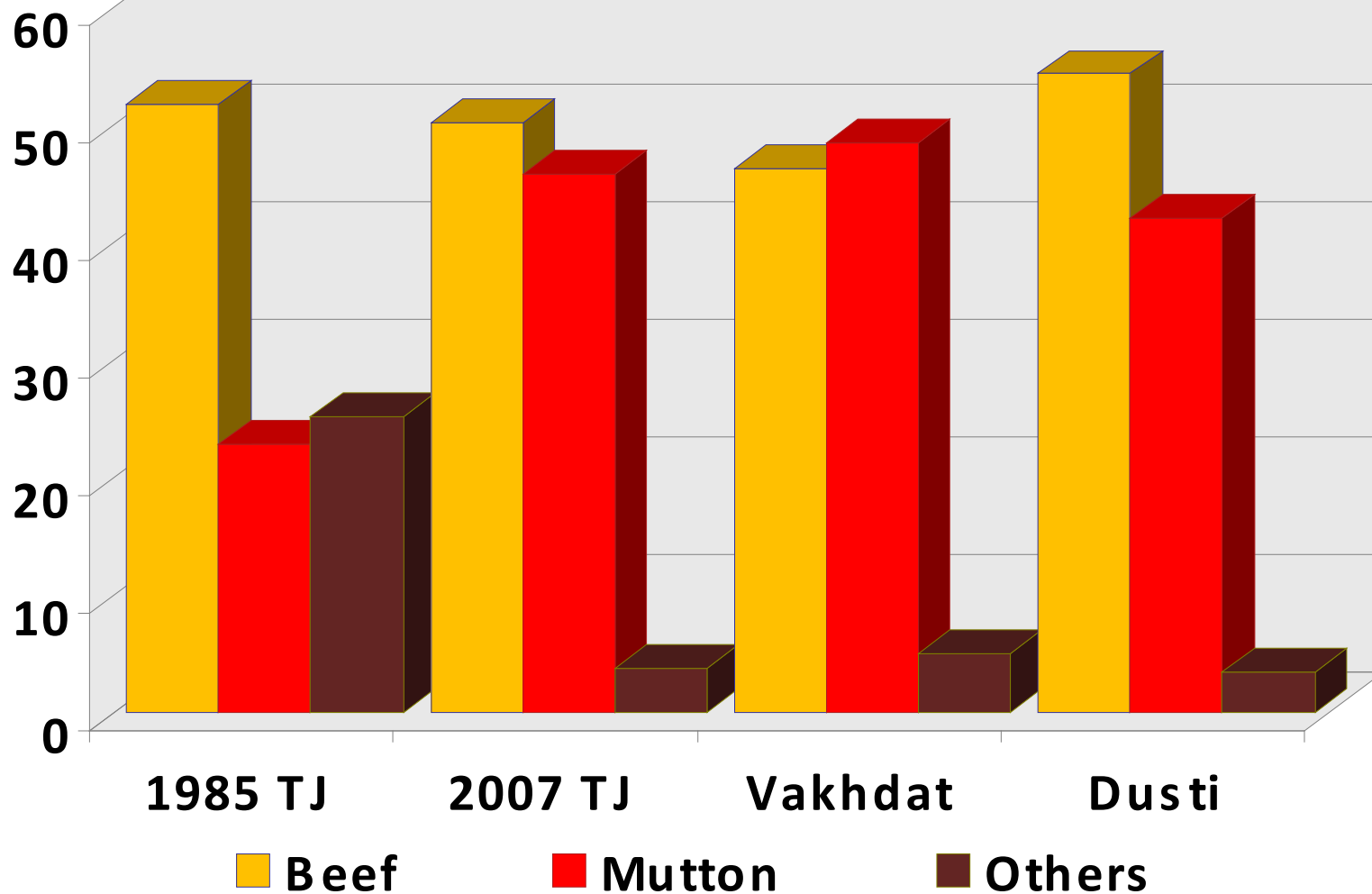
Percentage of age and sex sheep groups by seasons



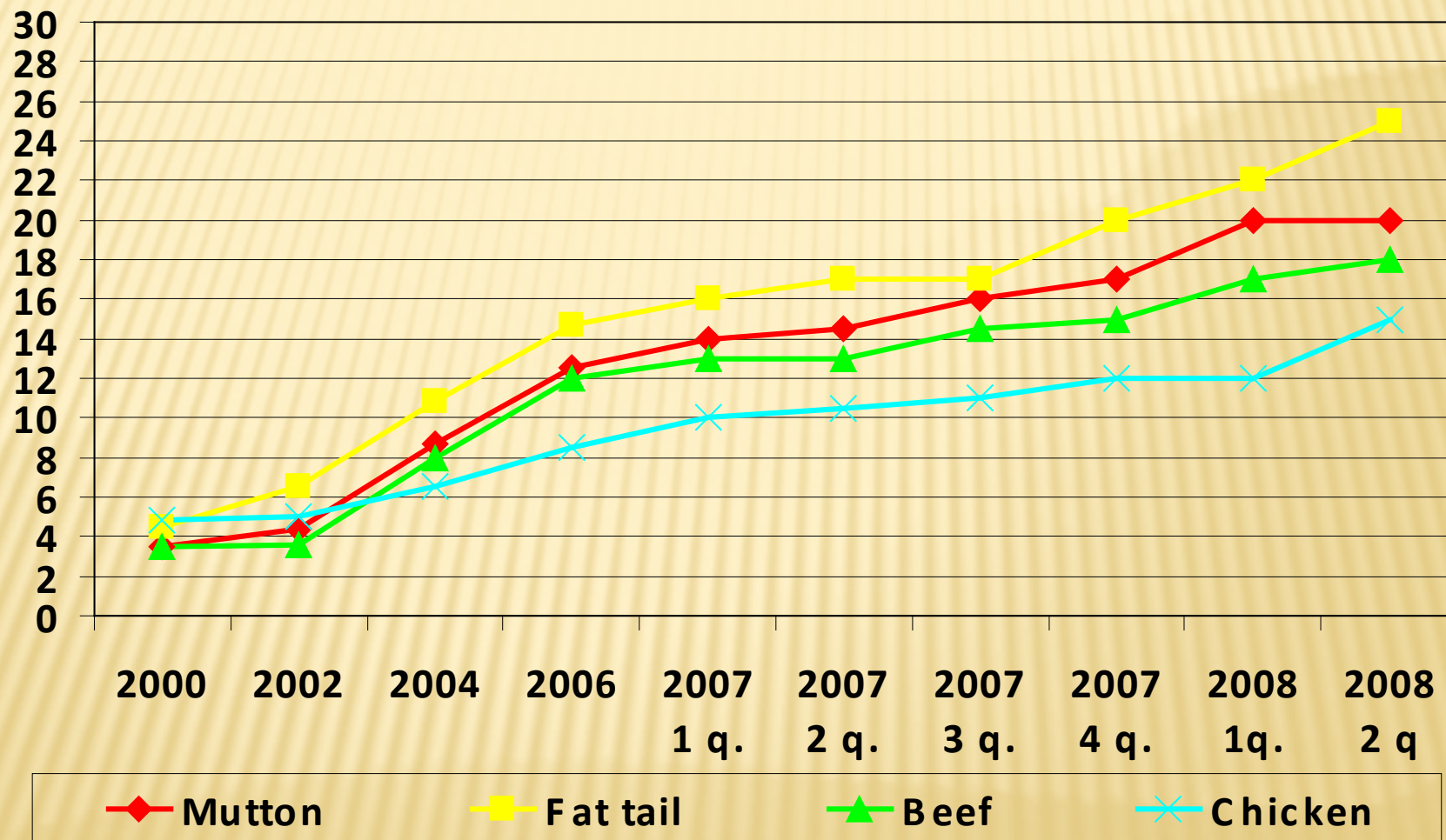
Major factors of price change at livestock markets

- ✓ **change in supply and demand**
- ✓ **the number of middlemen**
- ✓ **rising prices for forages and concentrated feeds**
- ✓ **increasing costs for various services**
- ✓ **growth of imports of low quality meat and meat products**
- ✓ **change of an income level of people including money transfers of migrant workers**

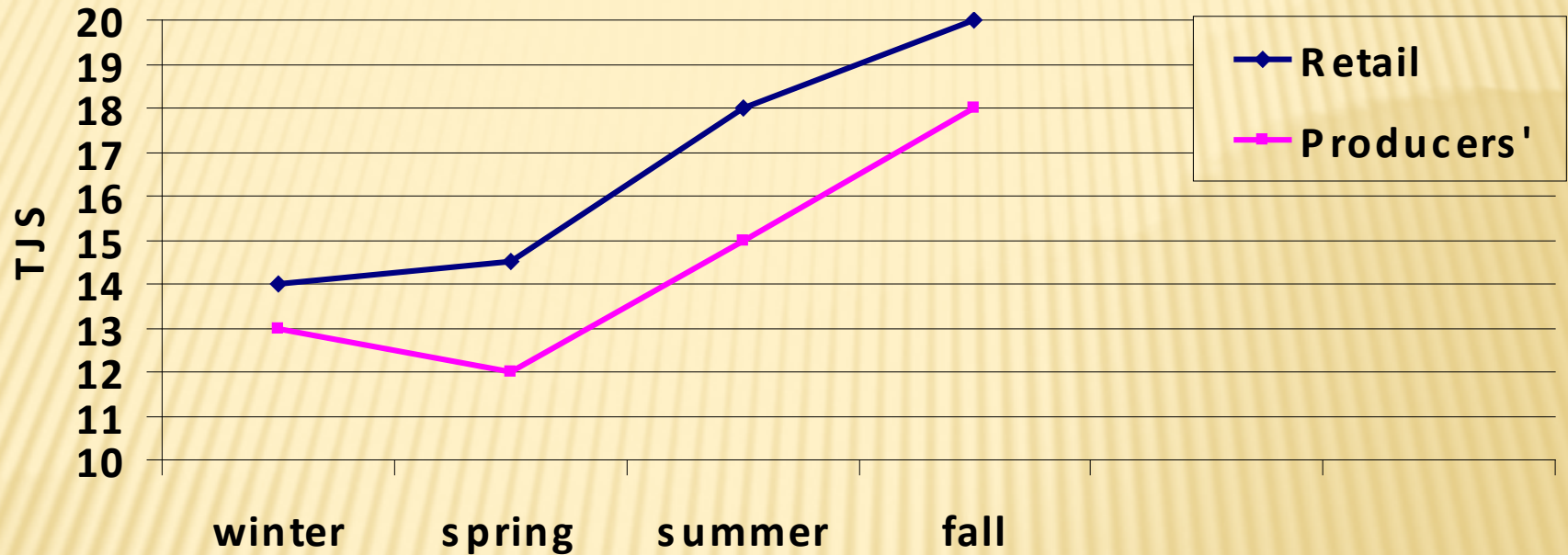
Share of production of different meat types for 1985 and 2007 (%)



Dynamics of average prices for different meat types in Vakhdat and Dushanbe for 2000 – 2008 (TJ Somoni)



Change of average producers' and retail sheep meat prices



Analysis shows that the difference between producers' and retail prices in 2000 was 16.6%, while in 2007 / 2008 it formed 14.3%. However, if 7 years ago producers lost TJS 1 (USD 0.28) per kg of sheep meat sold, nowadays this loss is up to TJS 3 (USD 0.90).

Distribution and selling of small ruminants

	Small reg. farms and households		Big reg. farms
	up to 15 heads	15 – 50 heads	over 50 heads
Selling for processing	1.01 %	0	2.08%
Selling of live animals at markets - for 2007	37.44 %	63.76%	70.01%
- for 2008	50.47%	75.53%	74.74%
Consumed by the producer's family, used for barter, etc. - Jan. – Dec. 2007	61.55 %	36.24%	27.91%
- Jan. – Oct. 2008	48.52	24.47	23.18%

Results of market and marketing chain analysis

- ❖ **After establishment of independence livestock markets have been developing spontaneously, and as a rule they don't meet the sanitary requirements.**
- ❖ **There is a lack of information and analytical data on markets and market prices by regions and for the entire country.**
- ❖ **Livestock markets are mainly located around cities, in the district centers, and in big villages. They operate separately from the food markets.**
- ❖ **Lower growth rate of supply than the growth rate of demand for livestock and livestock products in local market led to a rapid price increase for last years.**

Conclusion

- **Small ruminants are the major source of livelihoods**
- **Gissar sheep have the highest percentage among other types and breeds of small ruminants kept and sold at markets**
- **By their live weight, growth, and development the reared sheep breeds are small. Their productivity is low and does not meet the breed standards**
- **Share of ewes in a flock is very low at 52 – 55% (for sheep production targeted for meat and fat the efficient percentage should be 70 – 75 %)**
- **There is no demand for wool and pelts in the local markets;**
- **In the most cases sheep are not fattened and mainly sold with a low live weight due to the need of cash rather than because of a good fatness**
- **Winter feeding provides only 50-58% of the nutritional requirements**

Conclusion

- **Livestock production systems are extensive**
- **For many smallholder livestock production is only means of subsistence rather than an income generating activity**
- **Because food markets in Tajikistan are not protected, and domestic production of livestock products is extremely low, imports of these products is gradually increasing**
- **Scarcity of natural resources as well as high population growth rate lead to increasing of prices and intensification of a biological competition between people and animals for consumption of cereal crops and other double purpose crops**
- **Existing issues show that it is necessary to continue this research especially on Gissar sheep production.**

Thank you!

