

# Thai duck industry is on the

**Thailand, the third largest world producer, number eight in terms of exports, is emphasizing its "farm to table" quality, following the 2004 AI crisis. Industry leaders take on the challenge.**

By Joyce Rainat, Bangkok, Thailand

**F**or the Thai Duck Breeders Association for Trading and Export and the Thai Broiler Processing Exporters Association, the traumas of the last two years, following the 2004 AI crisis that severely hampered both the Thai chicken and duck industry, cutting production and exports, are being addressed, with a "turn-around" firmly predicted, says Saroj Tarikachon, president of the Duck Breeders Association.

1983 was the first year that Thai duck exports were registered but as an industry, exports of duck breasts and legs, did not take off until 1995, primarily to the EU (39%) and Japan (28%).

By 1998, the industry had already moved into exports of cooked ducks, which reached its peak in the year of the AI outbreak (2004), with exports of 4,126 metric tons; 3,608 metric tons cooked duck breasts and legs and 518 metric tons fresh meat.

In 2005, all exports of duck meat, amounting to 4,500 metric tons were further processed and safeguards were introduced by the Ministry of Agriculture and



**New regulations controlling the movement of free-range ducks have been put into effect and the switch to closed system farming is being made both mandatory and affordable.**

Cooperatives, banning the raising of free-range ducks in 25 central provinces.

## Controlled movement

Known to have a strong resistance to the AI H5NI virus, free-range ducks have nonetheless become carriers of the disease and therefore their movements had to be controlled. "Restrictions on the movements of free-range ducks can not

be eased," was the message that Deputy Agriculture Minister Newin Chidchob delivered to a meeting of free-range duck farmers, who had protested against the compulsory measures banning any relocation of ducks to prevent bird-flu re-emerging.

"I understand your difficulty in changing your way of life, but you have to change. We can't let things go on as they have in the past because the situation has changed. If you can't adapt yourselves to a safer system, you are going to destroy your own profession," he told the farmers, who have been encouraged by the ministry to adopt closed-system farming by the start of next year.

## Outbreak effects

The year prior to the AI outbreak in 2003, 74.25% of Thailand's total duck meat exports of 13,362 metric tons were fresh and 25.75% were cooked. By 2004, after the AI outbreak, duck meat exports dropped to 4,126 metric tons, of which only 12.55% were fresh and 87.45% were cooked. This year, 2005, Thailand's total duck meat production for export, amounting to 4,500 metric tons, are all further processed, guaranteeing what Saroj Tarikachon says is "farm to table quality".

But the duck industry's recovery is not

**Table 1 - World Production**

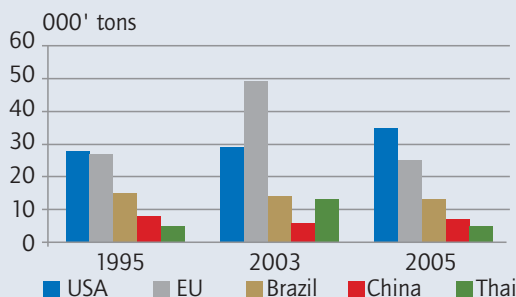
Country	Unit : '000 tons						
	2000	2001	2002	2003	2004 (p)	2005 (f)	% 2005
1.China	1,997	1,966	2,088	2,193	2,190	2,190	66.36
2.France	233	231	254	250	240	240	7.27
<b>3.Thai*</b>	<b>105</b>	<b>109</b>	<b>110</b>	<b>112</b>	<b>85</b>	<b>87</b>	<b>2.63</b>
4.Vietnam	70	77	82	83	83	84	2.55
5.Malaysia	51	51	51	51	58	58	1.76
6.USA	53	56	53	51	53	53	1.59
7.Germany	40	41	46	50	50	50	1.52
9.Hungary	43	45	45	37	45	45	1.36
10. UK	41	47	44	43	44	44	1.32
11.S.Korea	45	45	56	42	43	43	1.30
Others	359	390	396	401	356	407	12.34
Total	3,035	3,059	3,223	3,313	3,245	3,300	100.00
% Change		0.80	5.40	2.78	-2.03	1.69	

\*Thailand is 3rd Biggest Producer

Sources : FAO, \* Duck Breeders Association for Trading and Export

# rebound

**Figure 1 - Thai Duck Export situation, before and after the AI crisis**



Source: USDA

complete. There has been a decisive fall-off in consumption, both locally and internationally, reflecting what Pornsri Laurujisawat, manager, Thai Broiler Processing Exporters Association, says is in reaction to the AI health-scare that has been widely publicized by the media.

## Guaranteeing quality

"In the poultry industry, we are seeing the same results; a big drop in world-wide consumption which has affected export volume (Tables 1 - 4). The challenge for both the duck and chicken producers is to 'guarantee' the farm to table quality of their product, and in this the Agriculture Ministry and the Livestock Development Department (DLD) have been both very helpful and resourceful.

"With ducks, the major problem has been with the small independent 'back-yard' free-range farmers, who cannot control their flocks' movement. But this is now in the process of changing as new regulations controlling the movement of these free-range ducks have been put into effect and the switch to closed system farming is being made both mandatory and affordable."

"Farm to table" quality can now be guaranteed, she says, adding that with the proper promotion, both local consumption and exports of processed duck meat, - breasts and legs - should return to the earlier levels, achieved before the 2004 AI outbreak (Table 5). "We have the results we have been able to achieve in returning chicken to its previous positive position in both the local consumption and export markets and for duck meat, it is just a matter of activating the most effective marketing strategies." ■

**Table 2 - World Exports**

Unit : '000 tons							
Country	2000	2001	2002	2003	2004 (p)	2005 (f)	% 2005
1.Hungary	25	24	27	29	30	35	23.65
2.China	25	38	46	49	20	25	16.89
3.France	17	15	14	14	13	13	8.78
4.Netherlands	9	8	8	6	6	7	4.39
5.UK	8	7	7	6	6	7	4.39
6.Germany	5	4	6	5	5	6	3.72
7.USA	5	6	5	5	5	5	3.38
<b>8.Thai*</b>	<b>8</b>	<b>10</b>	<b>11</b>	<b>13</b>	<b>4</b>	<b>5</b>	<b>3.04</b>
9.Canada	2	2	3	3	3	33	2.16
10.Denmark	2	2	2	1	1	1	0.74
Others	28	39	60	56	84	78	53
Total	107	132	162	159	147	148	100.00
% change		23.00	22.70	-1.66	-7.50	0.70	

Exports after AI Crisis (2004) Duck Export Volume Reduced Sharply

Sources : FAO, \* Duck Breeders Association for Trading and Export

**Table 3 - World Importers**

Unit : '000 tons							
Country	2000	2001	2002	2003	2004(p)	2005 (f)	% 2005
1.China	56	54	53	56	50	50	37.04
2.Germany	27	28	22	19	18	19	14.07
3.Japan	15	9	12	12	10	11	8.15
4.Australia	3	4	6	6	6	6	4.44
5.UK	5	6	6	5	5	6	4.07
6.Spain	4	4	4	5	4	5	3.63
7.Denmark	3	3	3	3	3	3	2.37
8.USA	1	1	2	2	2	2	1.70
9.S.korea	4	5	1	2	2	2	1.48
10.Netherlands	2	2	1	1	1	1	1.04
Others	46	53	31	22	29	30	22.00
Total	165	168	142	135	130	135	100.00
% change		2.20	-15.49	-5.32	-3.48	3.80	

Sources : FAO, \* Duck Breeders Association for Trading and Export

**Table 4 - World Per capita Consumption**

Unit : KG							
Country	2000	2001	2002	2003	2004(p)	2005 (f)	Average
1.France	3.66	3.63	4.02	3.96	3.79	3.74	3.80
2.China	1.54	1.49	1.58	1.65	1.67	1.63	1.59
<b>3.Thai*</b>	<b>1.55</b>	<b>1.54</b>	<b>1.54</b>	<b>1.52</b>	<b>1.10</b>	<b>1.28</b>	<b>1.42</b>
4.Hungary	1.87	2.14	1.83	0.77	1.54	1.02	1.53
5.Vietnam	0.89	0.98	1.02	1.03	1.01	1.00	0.99
6.Singapore	0.54	0.67	0.60	0.61	0.62	0.62	0.61
7.UK	0.43	0.45	0.49	0.55	0.55	0.54	0.50
8.Germany	0.37	0.35	0.34	0.35	0.35	0.34	0.35
9.USA	0.17	0.18	0.17	0.16	0.16	0.16	0.16

Sources : FAO, \* Duck Breeders Association for Trading and Export

**Table 5**

		2001	2002	2003	2004 (p)	2005 (f)
<b>Live Birds</b>	Mil. Bird	70	71	72	42	43
<b>Production</b>	000' MT.	108	110	112	85	87
<b>Consumption</b>	000' MT.	95	99	98	80	82
<b>Per Capita Cons.</b>	Kg/per/y	1.55	1.54	1.54	1.10	1.28
<b>Export Quantity</b>	000' MT.	10.5	11.1	13.3	4.1	4.5
<b>Export Value</b>	Mil. Baht	840	1,064	1,646	712	810
<b>Export Ratio</b>	%	9.72	10.09	11.87	4.82	5.17

Sources : Duck Breeders Association for Trading and Export