



A profile on duck meat



**agriculture,
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1. INTRODUCTION

The production of duck meat in the world has continued to show an upward trend, with Asia producing approximately 82% of duck meat. Africa, on the other hand, produces about 2% of duck meat in the world, with Egypt and Madagascar as major producers. In South Africa, it has emerged that duck meat is not produced in most areas, with KwaZulu-Natal noted as the prominent and major producer. Therefore, duck meat could be identified as a niche product; given its low consumption and production rate (Farmer's weekly, 2011). However, duck production and meat have shown notable increment in recent years in South Africa, growing from 350 000 heads and 1 000 tons in 2000 to 395 000 heads and 1 108 tons in 2013, respectively (FAO, 2016).

The purpose of this study is to provide a descriptive analysis of duck meat, with a main focus on production and trade patterns of duck meat. Further analysis with respect to duck meat processing and also issues relating to the duck meat market are explored. The study provides useful insights in terms of whether the duck meat industry can be supported and be sustainable in South Africa. The organisation of the study is as follows; firstly is the analysis of the production of duck meat in the world, followed by duck meat processing, trade patterns and then conclusion.

2. OVERVIEW OF DUCK MEAT IN THE WORLD

Duck meat is consumed around the world; commercialising duck meat requires expertise and substantial investments. Ducks fall under the poultry industry; though the most produced and consumed happens to be chicken/broiler meat, duck meat has over the years been expanding at a slower rate. Most notable breeds available for meat production are Pekin, Muscovy, Aylesbury and Rouen. The Pekin duck is the predominant breed used for commercial meat production worldwide and Asia is regarded as the most producing continent of duck meat (Stein, 2012).

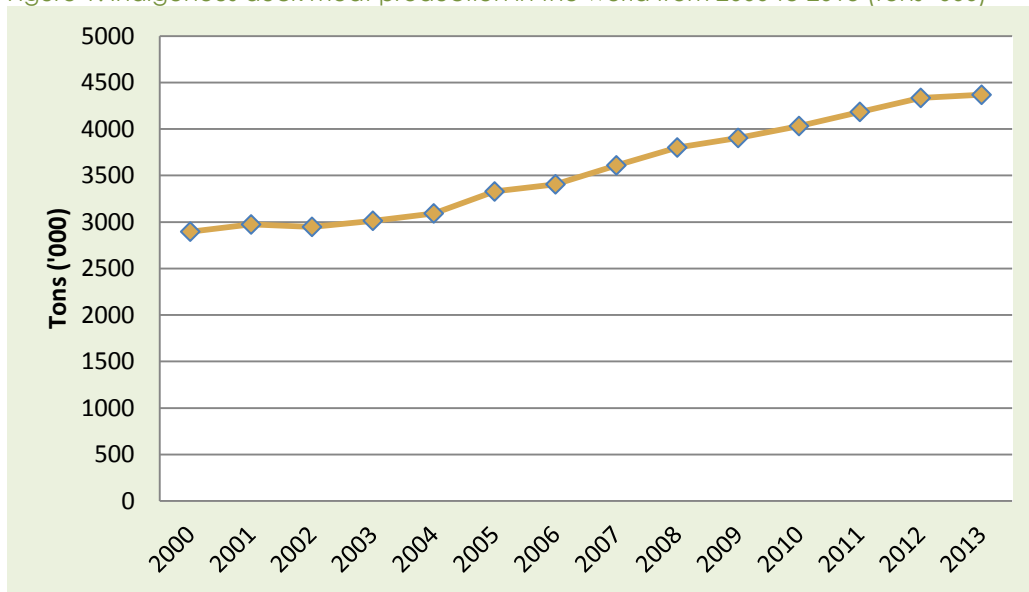
3. DUCK PRODUCTION

According to FAO (2016), duck meat production has been growing in recent times. Asia has been the most producing region/continent followed by Europe; Oceania has been the least producing region, with Africa just ahead of Oceania. Moreover, Egypt and Madagascar are recorded as the major producers in Africa; while in Asia, Europe, America and Oceania the major producing countries are China, France, United States and Australia, respectively.

Figure 1 below shows the world production of duck meat from 2000 to 2013. According to FAO statistics (2016), indigenous duck meat production has been on the increase for over a decade. During the years under review shown in Figure 1, it shows that duck meat

production nearly doubled, production increased from 2 386 000 tons in 2000 to 4 367 000 tons in 2013.

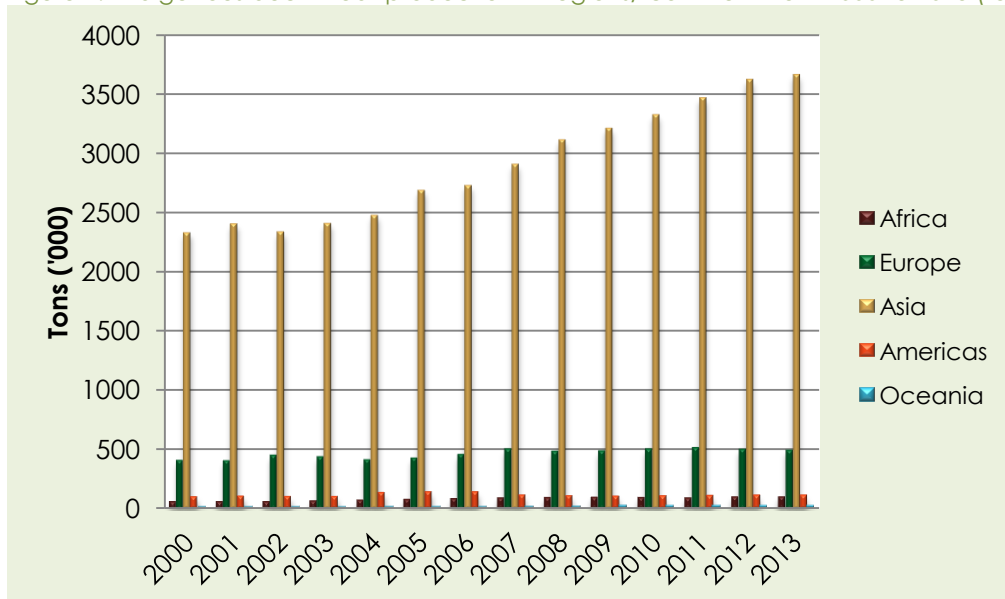
Figure 1: Indigenous duck meat production in the world from 2000 to 2013 (tons '000)



Source: FAO, 2016

Figure 2 depicts indigenous duck meat production by continent over 14 years. Between 2000 and 2013, Asia has vastly topped the continental production of duck meat while Europe followed in second place. However, Oceania has always been at the bottom of the charts, followed by Africa.

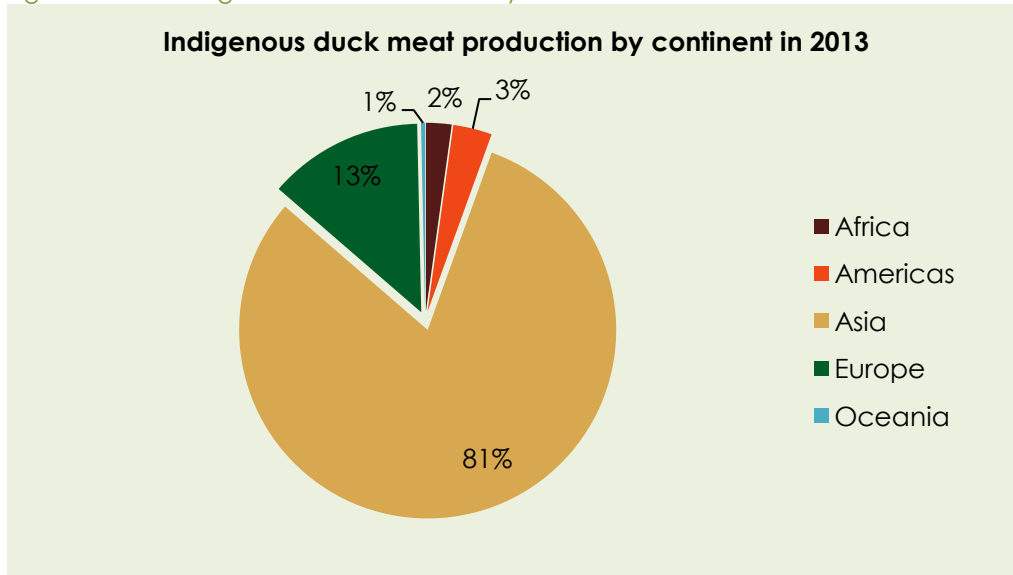
Figure 2: Indigenous duck meat production in regions/ continent from 2000 to 2013 (tons '000)



Source: FAO, 2016

Furthermore, Figure 3 below shows percentage shares of duck meat production by region in 2013. Asia topped the charts with a production share of 81%, whereas Oceania was the least producing region with a share of 1%. On the other hand, Africa only contributed 2% of duck meat production.

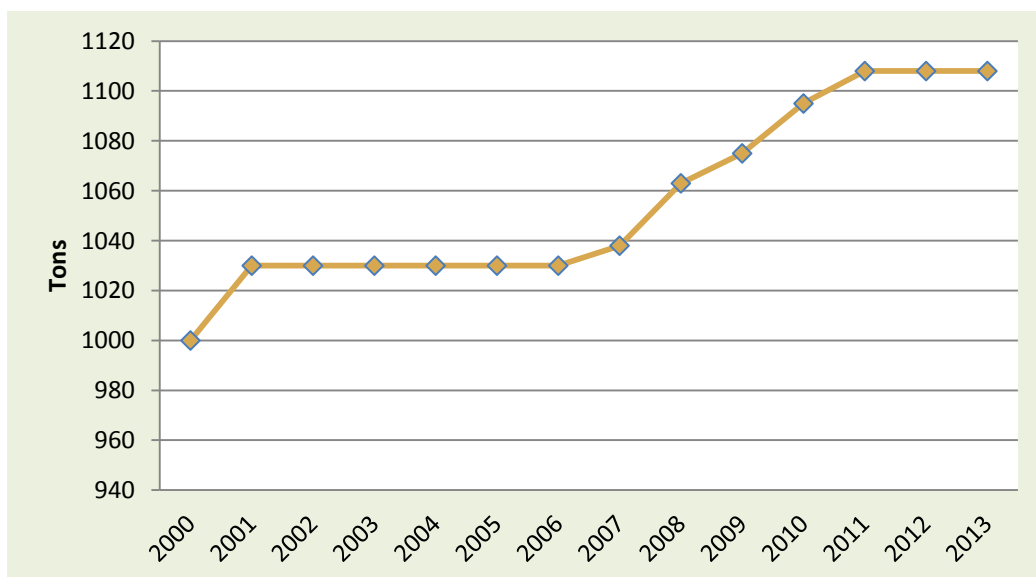
Figure 3: Percentage share of duck meat by continent in 2013



Source: FAO, 2016

Similar to overall world duck meat production, South African duck meat production has been on an upward trend since 2000; it grew from 1 000 tons in 2000 to 1 108 tons in 2013. However, over the period of 2001 to 2006 and 2011 to 2013, production experienced stagnation at 1 030 and 1 108 tons, respectively (see Figure 4).

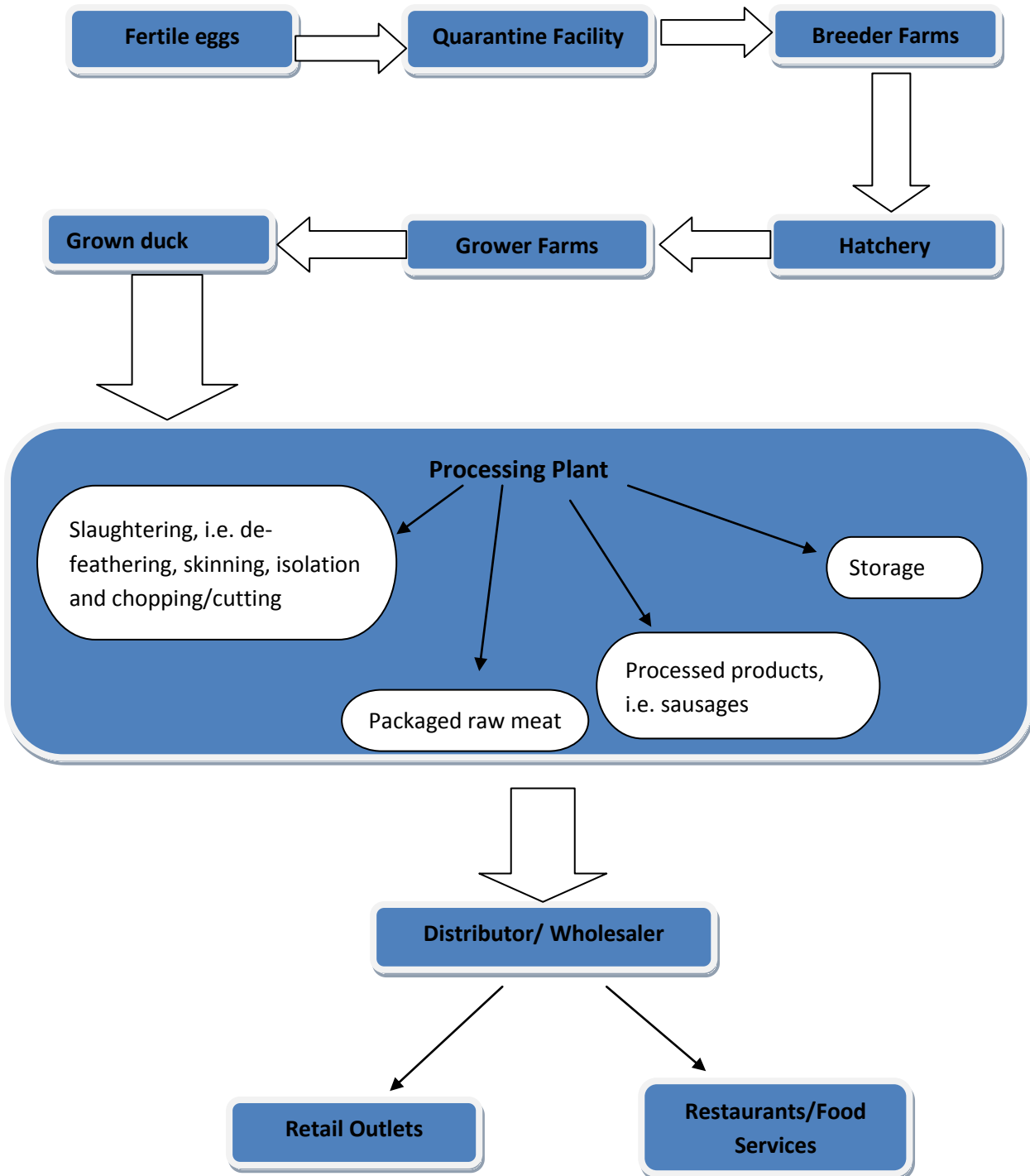
Figure 4: Indigenous duck meat production in South Africa from 1998 to 2013



Source: FAO, 2016a

4. DUCK MEAT PROCESSING

Processing of duck meat occurs through different stages. In a nutshell, it starts with fertile eggs, healthy ducklings and then healthy grown ducks; followed by slaughtering, then de-feathering, cutting/chopping, marketing and then consumption (Marel, 2015). According to Stein (2012) the stages are summarised as follows:



Source: Stein, 2012

5. DUCK MEAT MARKETING

Like any other products on the market, duck meat is also subjected to pass through some marketing channels. It is always the producer/supplier's responsibility to consider the needs of the consumers when marketing the product. According to Huda et al (2011), the following are the aspects that need to be considered in order to penetrate duck meat markets:

- Husbandry/breed
- Duck meat preparation and processing
- Selling price
- Product information
- Labour productivity/efficiency.

Huda et al (2011) further argued that duck meat is faced with several market constraints and these constraints are exacerbated by:

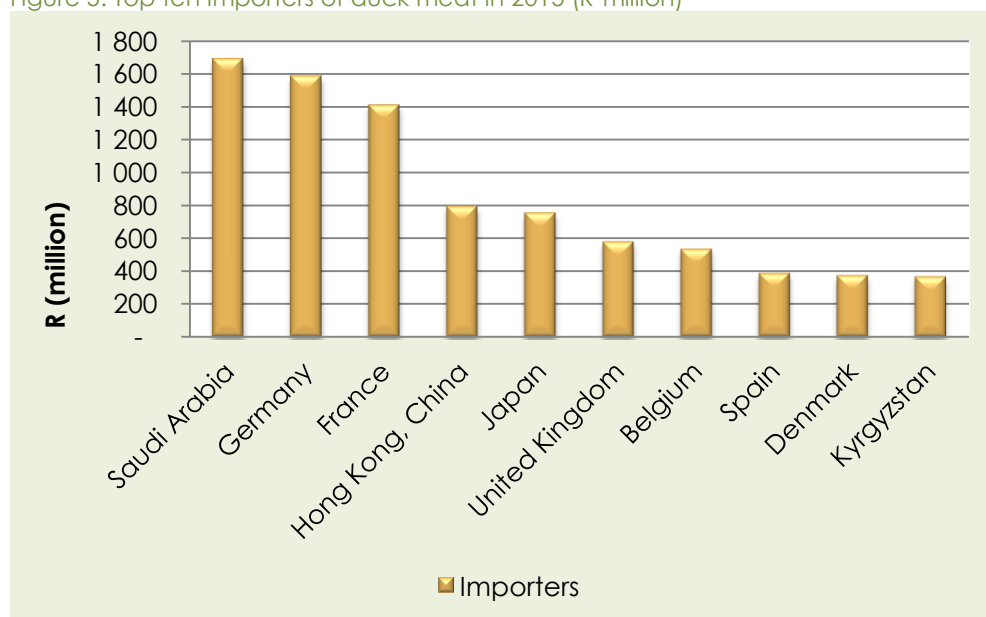
- Unavailability of duck meat in most markets
- Low consumption rate
- Low levels of acceptance by societies
- Ability to slaughter/availability of processing facility.

6. TRADE PATTERNS

6.1 International Trade

Duck meat is traded by countries across the globe. Figure 5 below shows the top ten importers in 2015. Saudi Arabia was the country with the most imports of duck meat in 2015 valued at R1 691 million, followed by Germany at R1 587 million whereas Kyrgyzstan was the smallest importer valued at R368 million. China, which is the major producer of duck meat, was the third importer in the world in 2015. This could imply that duck meat is consumed, stored or processed in large volume in China. In Africa, duck meat consumption seems to be relatively low as shown by the fact that there are no African countries in the top ten importers. Detailed values for all top ten importers are provided in Table 1 below.

Figure 5: Top ten importers of duck meat in 2015 (R'million)



Source: Trade Map, 2016

Table 1: Values for top ten importers of duck meat¹ in the world from 2012 to 2015¹ (R'million)

Importers	2012 (R'million)	2013 (R'million)	2014 (R'million)	2015 (R'million)	Average from 2012 to 2015
World	6 426	8 815	11 705	11 511	9 614
Germany	1 229	1 660	1 876	1 587	1 588
France	1 118	1 274	1 432	1 410	1 309
Saudi Arabia	29	355	1 680	1 691	939
Japan	424	640	819	757	660
Hong Kong, China	499	588	713	796	649
Belgium	494	570	704	536	576
UK	331	479	577	580	492
Spain	245	396	446	390	369
Denmark	306	366	396	376	361
Czech	283	342	321	288	308

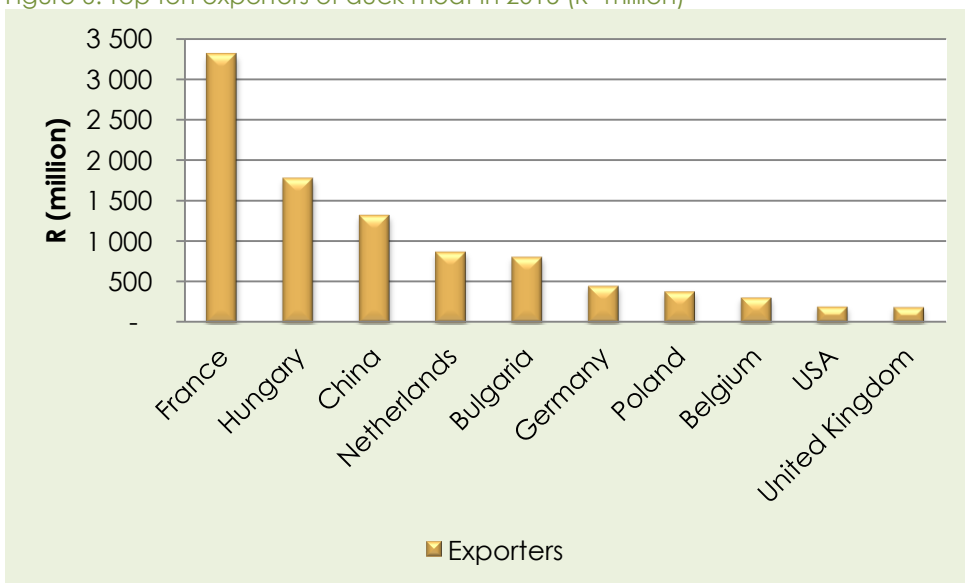
¹ HS code included: 020741, 020742, 020743, 020744, 020745

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Source: Trade Map, 2016

On the exporters' side, Figure 6 depicts the top ten exporters of duck meat in 2015. France, the major producer in Europe, was recorded as the leading exporter in the world, whereas the United Kingdom was the tenth exporting country in 2015. Compared to top ten importers, no African countries are featured on the list. France leads the exports with a value amounting to R3 312 million, while United Kingdom follows with R194 Million. France also led the charts on average exports from 2012 to 2015. Average and actual export values for respective years are presented in Table 2 below.

Figure 6: Top ten exporters of duck meat in 2015 (R' million)



Source: Trade Map, 2016

Table 2: Values for top ten duck meat exporters in the world from 2012 to 2015 (R' million)

Exporters	2012 (R'million)	2013 (R'million)	2014 (R'million)	2015 (R'million)	Average from 2012 to 2015
World	7 326	9 836	11 352	10 754	9 817
France	2 493	3 160	3 539	3 312	3 126
Hungary	1 118	1 543	1 725	1 785	1 543
China	637	786	1 001	1 330	938

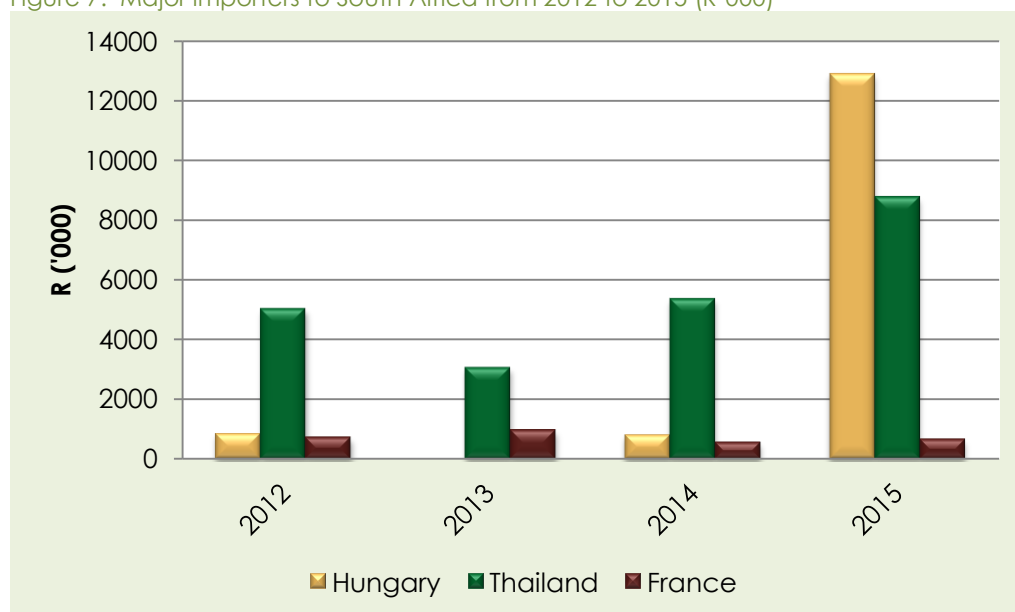
Netherlands	454	757	963	876	762
Bulgaria	736	868	978	813	849
Germany	605	602	684	455	586
Poland	114	250	419	389	293
Belgium	278	263	356	313	303
US	84	145	161	202	148
United Kingdom	156	189	158	194	174

Source: Trade Map, 2016

6.2 Trade of Duck Meat in South Africa

South Africa has over the years engaged in trade of duck meat continentally and globally. Figure 7 shows major countries that South Africa imports their duck meat from. In 2015, South Africa had only two major countries it imported duck meat from, which were Hungary with an import valued of R12 899 000 and Thailand to the value of R8 765 000 then followed by France with a value of R660 000 .

Figure 7: Major importers to South Africa from 2012 to 2015 (R'000)



Source: Trade Map, 2016a

Table 3 below shows the value of the top exporters of duck meat to South Africa from 2012 to 2015. On an average, from the years under review, Thailand is the major exporter of duck meat to South Africa, which is followed by Hungary at second place. Thailand and Hungary exported duck meat to a value of R5 562 000 and R3 649 000 on average, respectively over the period 2012 to 2015.

Table 3: Values for exporters of duck meat² to South Africa over four years (R'000)

Exporters	2012 (R'000)	2013 (R'000)	2014 (R'000)	2015 (R'000)	Average from 2012 to 2015 (R'000)
Thailand	5038	3073	5370	8765	5 562
Hungary	875	0	823	12899	3 649
France	720	960	563	660	726
United Kingdom	573	1191	0	0	441
Ireland	605	1143	0	0	437

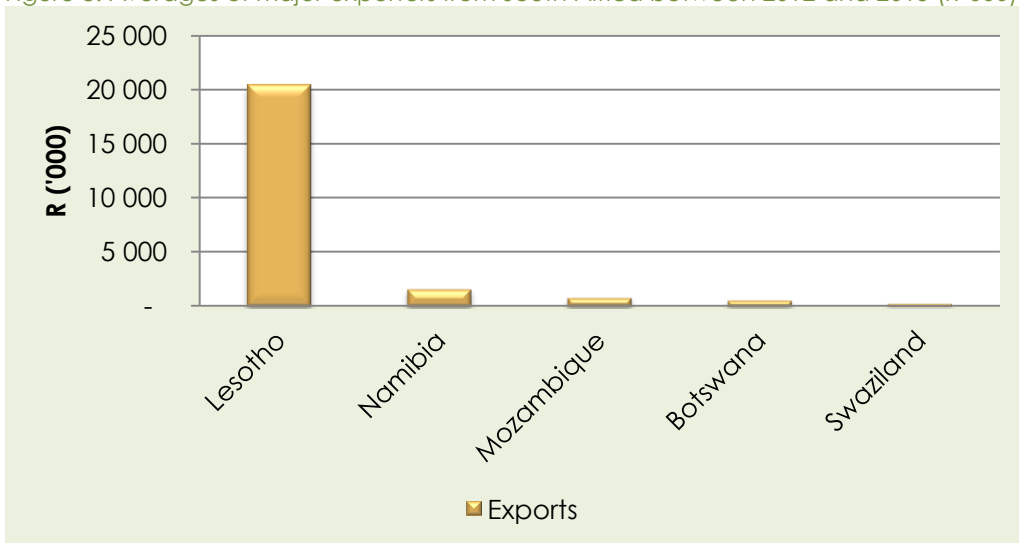
² HS code included: 020741, 020742, 020743, 020744, 020745

Namibia	0	1114	0	0	279
Germany	393	346	0	0	185
Lesotho	0	0	22	0	6
China	0	10	0	0	3

Source: Trade Map, 2016a

The Southern African Customs Union (SACU) countries dominate the statistics on the imports from South Africa. There is a free movement of goods between the SACU member States. Lesotho was recorded as the major importer of duck meat from South Africa over the period 2012 to 2015, with import valued at R20 381 000, while Swaziland was recorded as the least importer with imports valued at around R269 000 over the years under review, see Figure 8 below. Additionally, Table 4 gives detailed values on major importers of duck meat from South Africa.

Figure 8: Averages of major exporters from South Africa between 2012 and 2015 (R'000)



Source: Trade Map, 2016a

Table 4: Importers of duck meat³ from South Africa over four years (R'000)

Importers	2012 (R'000)	2013 (R'000)	2014 (R'000)	2015 (R'000)	Average (R'000)
Lesotho	1 170	3 131	23 407	53 817	20 381
Namibia	278	1 200	4 201	850	1 632
Mozambique	229	432	2 501	165	832
Botswana	597	365	1 072	279	578
Swaziland	-	115	11	951	269
DRC	8	-	43	558	152
Zimbabwe	139	58	227	152	144
Angola	33	230	32	114	102
Ghana	303	38	54	-	99
Saint Helena	8	10	87	25	33

Source: Trade Map, 2016

7. TRADE BALANCE

South Africa's production of duck meat has grown over the years, dating back to over a decade. Figure 9 below shows the trade balance of duck meat in South Africa over the period 2012 to 2015. South Africa had a trade deficit in 2012 and 2013. Conversely, South Africa enjoyed trade surplus in 2014 and 2015. During the years under review, trade deficit peaked in 2012 at a recorded value amounting to R13 585 000 and the trade surplus peaked in 2014 at a value amounting to R18 275 000.

³ HS code included: 020741, 020742, 020743, 020744, 020745

Figure 9: Trade balance of duck meat in South Africa (R '000)



Source: Trade Map, 2016a

8. CONCLUSION

Duck meat production is a commercial business operating world-wide. Just like any other business venture it requires planning and substantial investments. In 2015 Asia was a leading producer of duck meat in the world. The world's leading exporter of duck meat was France, while Saudi Arabia was the leading importer.

The production and consumption of duck meat in Africa is relatively low. This is justified by the fact that there are no top exporting and importing African countries in the world. However, major African producers of duck meat are Madagascar and Egypt. Lesotho was recorded as the leading importer of duck meat on the African continent on world statistics and also the top importer of duck meat from South Africa. Hungary was recorded as the major duck meat supplier to South Africa in 2015. Furthermore, South Africa has a great export potential, particularly to SACU (Southern African Customs Union) and (SADC) Southern African Development Community countries and other African countries. Therefore, duck meat production in South Africa could be sustainable particularly at an advanced commercial level.

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