

MAKING IMPACT



ONE HEALTH POULTRY HUB



2023

INFORMING ACTION FOR SAFER, FAIRER FARMING

IN BRIEF

A guide that makes political economy research tools accessible to all is providing livestock workers, policymakers and others with the knowhow needed to campaign for fairer food production practices.

Who controls poultry production matters. It has implications for health, equity and the environment. It especially matters in low- and middle-income countries (LMICs), where the poultry sectors are growing rapidly and animal-meat protein and eggs in people’s diets are recognised as important for healthy lives, in particular to prevent malnutrition and stunting in children.

Concentration of the poultry industry can affect whether:

- birds are safely and sustainably produced with minimal risk of disease,
- poultry workers are treated decently and paid fairly,
- poultry waste is disposed of responsibly, and
- chicken products are safe and affordable for most people.

A clear understanding of the actors that control poultry production and the factors that enable their control is critical for people working towards healthier, fairer food systems.

Amid urbanisation, economic growth and changing diets in LMICs, industrialised and intensive poultry production systems have become the dominant form of meeting demand for chicken meat and eggs in these countries. This follows a path already taken in economically wealthier parts of the world. For example, in India in just 30 years poultry production has moved from backyard farming systems, often run by women, to industrial enterprises where key aspects of the industry, from breeding genetics and hatcheries to feed mills and poultry distribution, are controlled – or vertically integrated (see figure) – by a

small number of companies. In addition to vertical integration, successful corporations may also expand power within the industry by increasing their market share – or horizontally integrating production. This can be concerning when one or two main players exist who are thus able to control the market, i.e., when oligopoly or monopoly situations occur. Researchers for the One Health Poultry Hub investigated the political economy of global poultry



Main image: Farmed chickens Credit: Artem Beliaikin via Unsplash. Inset: figure showing the difference between vertical and horizontal integration in poultry farming.



The approach provides users with a mechanism to shift the food systems conversation beyond productivity growth

genetics and showed that rapid intensification develops as a consequence of an international financial system which favours industrial concentration, and national and international policy landscapes which reinforce this.

In India and Bangladesh, the research showed intensification was hastened following the International Monetary Fund and World Bank's structural adjustment programmes of the early 1990s. A series of mergers and acquisitions of global poultry breeding companies percolated to the Indian market, and now three main companies dominate, these being dependent on three international companies. In Bangladesh, most of the market is controlled by a handful of domestic firms and reliant on imports from two international

MORE ABOUT THE GUIDE

TITLE 'Identifying economic and financial drivers of industrial livestock production – the case of the global chicken industry'

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FUNDER Tiny Beam Fund

The Guidance Memo provides step-by-step guidelines on how to:

1. Ask relevant questions related to economic policies governing the food system at the global, national and sub-national levels.
2. Collect data about corporate power, from interrogating ownership structures to exploring investment portfolios of public development banks.
3. Analyse this data.

Find the guide at:

issuelab.org/resources/40548/40548.pdf

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ones, though the public sector and an unorganised private sector also supply the market. Latest Hub research suggests, however, that multiple factors are driving further integration and industrialisation. Such concentration of control and intensification of production makes public oversight and appropriate policy critical as:

- producing industrial monocultures of livestock raises questions about risks of emergent diseases, and
- concentrated ownership structures have implications for equity and food safety.

Critical research can help to understand how the varying set ups of poultry production affect food security, food safety, livelihoods and equity. A Guidance Memo has been produced to help campaigners, policymakers, researchers and people in the livestock sector to undertake their own investigations into corporate expansion and concentration. It enables non-experts to gain skills and knowhow to generate evidence about the linkages between global finance and industrialised farming systems and how they

are structured and controlled. The guide has been used by those fighting for better farming policy and practices to unpack the status of corporate concentration in different contexts. For example, the Stop Financing Factory Farming coalition used the Memo to inform its strategy and advocacy for development banks to stop investing in industrial animal agriculture, including at the World Bank Spring Meetings in April 2023. Faunalytics, which empowers animal advocates with access to research and data, has added the guide to its database of research resources. Researcher Dr Mehroosh Tak said: "The approach suggested in the Memo provides users with a mechanism to shift the food systems conversation beyond productivity growth to find ways to create a more just and fit-for-purpose food system – one both more sustainable and equitable in providing adequate nutrition for all while reducing the risk and burden of disease."

ABOUT US

The GCRF One Health Poultry Hub is an impact-driven research and development programme working to help meet Asia's growing demand for chicken meat and eggs while minimising risk to local and global public health. Working in Bangladesh, India, Sri Lanka and Vietnam, it is taking an interdisciplinary and intersectoral 'One Health' approach, exploring how rapid expansion of poultry production increases risk of infectious disease and why certain processes and behaviours are risky. It is funded by UK Research and Innovation through the Global Challenges Research Fund, a key component in delivering the UK aid strategy.

WEBSITE onehealthpoultry.org

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