

## The Role of Livestock Sector and Animal Source Foods

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### Description

The SAVA region, located in north-eastern Madagascar, is a global hotspot of vanilla production. Here, soaring vanilla prices over the past 7 years, the so-called “vanilla boom”, improved the socioeconomic situation of the farming population, which may change dietary patterns towards higher meat consumption and offer an opportunity for regional livestock producers. This paper therefore investigates if the vanilla boom opened new market opportunities to local stakeholders by targeting 81 livestock producers, 23 butchers, and 34 retailers involved in the supply chain of live animals and animal products in the region.

Starting from regular food markets of three major cities and three villages, data on animal and meat sales in and outside the vanilla selling season was collected. Information on opportunities and challenges faced by different stakeholders was recorded, and the determination of the geographical location of markets, animal and product origins served the compilation of food sheds. Results revealed that local livestock producers are mostly supplying poultry while butchers are exclusively selling zebu cattle and pigs.

Zebus and eggs are completely sourced from neighbouring as well as distant regions to meet the huge local demand, while poultry and pigs are mostly supplied by regional producers. Animal sales volumes increase during the vanilla selling season, due to a temporarily enhanced regional purchasing power based on cash income from vanilla sales. Although the high demand motivates local and more remote producers to intensify their livestock activities, livestock diseases, lack of appropriate animal management, and market information hamper their endeavours. Transparent and timely market information flow, training of livestock producers, as well as investments in transportation and marketing infrastructure could support the development of the local livestock sector and improve the local supply with animal source food in the SAVA region.

### Livestock Sector

To disentangle opportunities and challenges for the livestock sector, a detailed identification of prevailing supply chain structures is required to understand market functioning and linkages, participation of different actors and critical constraints that limit growth or intensification and professionalization of livestock production and consequently the competitiveness of

smallholder farmers. Especially in developing countries, livestock supply chains are characterized by long production and marketing channels with various phases of animal feeding, different (informal) levels of traders and transactions, multiple stages of processing, and a variety of employment-creating services and inputs. In this context, livestock supply chain analysis can support investments into and sustainable expansion of livestock production, as it helps to clarify complex regional livestock production and trade relationships, both economically and physically.

Another general approach is to assess the livestock market value chain. Its concepts go beyond the supply chain, often used by development practitioners and researchers, to capture the interactions of increasingly dynamic (and complex) markets in developing countries and to examine the inter-relationship between diverse actors involved in all stages of the market channel. Another tool that is increasingly used and also providing valuable insights into food supply chains is the mapping of food sheds. It is used to illustrate the geography of food supply and depict linkages between food-producing and food-consuming regions at different scales. This helps to understand the flow of food from its original sources and production sites to its sinks and consumption sites.

### Animal Source Foods

Livestock markets are primarily driven by consumer demand; globally, poor people are increasing consumption of animal products as they become urbanized and their incomes rise. Although increasing animal product consumption may be a way of showing social status, meat consumption in particular is strongly influenced by culture, as for instance beef is not consumed in some cultures and pork not in others (*ibid*). In Madagascar, some taboos, such as a ban on consumption of sheep milk in the southern region, may also influence the availability of certain products in local markets.

In the SAVA region of north-eastern Madagascar, where the largest global share of bourbon vanilla is produced, the socioeconomic situation for the local population has improved in recent years as manifested in high vanilla prices received, rising incomes, improved food security, education, and access to electricity. Such development, in turn, provides opportunities for intensifying regional livestock production and may stimulate investments into livestock value chains.

With regards to human nutrition, animal source foods can greatly benefit people who suffer from undernourishment or have high protein and fat requirements, such as children and pregnant women; these are particularly vulnerable groups in Madagascar. To date, small-scale animal husbandry prevails in the SAVA region-most households keep livestock, but the degree of professionalization is low and livestock management practices are poor. Hence, the contribution of this activity to income diversification of vanilla farmers is limited (*ibid.*)

Against this particular situation, the present paper investigates if the so called "vanilla boom" in the SAVA region,

which started in 2014 and was still ongoing during the period of our study, opened up new market opportunities for live animals, meat, and animal products. The data was collected in the year 2018/19, when vanilla prices were remarkably high. Adopting a market chain analysis approach, information was gathered on the activities of livestock producers, retailers and butchers, during and outside the vanilla selling season, as well as on their perceived opportunities and challenges. The goal of the study was to understand the characteristics and structure of the market supply of livestock and animal products in the SAVA region, and to identify options for strengthening the sector.