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WHO RULES THE ROOST?

Corporate vs community
poultry in Africa



“If you get off a plane anywhere on the globe and buy an egg, there’s a 50 per cent chance that the egg was laid by a hen whose parents were produced by us.”
– Frans van Sambeek, Hendrix Genetics, 2015¹

Not long ago, Ghana had a thriving poultry sector. After decolonisation from the Brits, the government boosted commercial production with strong public extension services to support local farmers and careful policies to control imports of foreign inputs. By the 1970s, the country was self-sufficient in chicken and even exporting to its neighbours. Then came the World Bank and International Monetary Fund with their structural adjustment policies that forced Accra to privatise and liberalise the industry – opening up its market to cheap imports from Europe, Brazil and the US – as a condition for loans. Today, Ghana imports 90% of its poultry meat needs, as local commercial production has been decimated, and the country is trapped in a bottomless pit of debt with the Washington institutions.

Despite this hollowing out of local wealth and resources, this could actually be a great moment for Ghana to move in the right direction.

Farmers’ organisations and social movements across the global South have long struggled to fight off the “Green Revolution” – a scheme cooked up by US interests to push agricultural modernisation in order to quash progressive agendas for social justice since the 1960s. Much of the organising work, from Accra to Ahmedabad, has focused on seeds, land, trade and now agroecology. But what about livestock? And what about poultry, more specifically? Today, the humble chicken is a direct target of agroindustrial expansion and philanthrocapitalist arrogance, especially in Africa. Yet like local seeds, indigenous breeds can be fiercely defended and improved upon for both immediate community needs and broader political agendas.

The “better” bird

Chickens have long been part of our backyards, farms and food systems. The bird was domesticated 8,000 years ago in Southeast Asia, and spread quickly to other parts of the world. In Africa, chickens are fairly ubiquitous. They are an important source of income, livelihood and health, especially for women and children. Chickens provide affordable protein (both meat and eggs) and are easy to keep. They serve as a savings bank, a currency for barter or cash, a centrepiece of cultural rituals, and a gift in times of celebration or mourning. Right now, chicken is the most highly consumed meat per capita in Africa, and the one growing the fastest. The same is true across the world. No wonder then that chicken rearing is being increasingly eyed for corporate takeover.

Over the centuries, rural communities have developed a wealth of chicken biodiversity in the form of breeds that are well adapted to their local environment. Yet only since the early 1900s did poultry breeding, like plant breeding, become an industry of its own. In fact, their histories are intertwined. In the US, hybrid maize – which would become the cornerstone of industrial agriculture – was developed in the 1930s by Henry A. Wallace. Wallace was Secretary of Agriculture at the time and went on to become Vice-President of the United States. He also founded Pioneer Hi-Bred, the world’s first multinational seed company. But probably few people know that Wallace also applied the same technique of hybridisation to chickens. By 1954, his “Hy-Line” chicken breed commanded 20% of the US

market for layers [egg-producing birds], and at one point accounted for three-quarters of the global market.²

Today, the poultry sector bears all the marks of Wallace's vision. The push to come up with a more "productive" bird that feeds well on monocropped maize and soybean has led to the industrial chicken business as we know it. Whereas in the 1960s, there were hundreds of poultry breeders playing an important role in different markets around the world, that figure has dropped to just three today. And as with Wallace's maize, they have followed the pattern of producing hybrids that do not pass their characteristics to the next generation. This means that a farmer relying on these "improved" birds has to regularly buy fresh stock from a company. The result of this is concentration at all levels: a few companies producing a few breeds that rely on a few crops for feed and a fairly centralised supply of vaccines.³

After waves of mergers, just three companies control the poultry genetics market today. Tyson in the US and Eric Wesjohann Group (EWG) in Germany produce the bulk of the world's broiler breeds, that is to say chickens raised for meat. The same EWG and Hendrix Genetics, of the Netherlands, share the market for layer breeds. In both segments, the level of market share is around 90%, evenly split by the two firms.⁴ And what has become of Wallace's famous "Hy-Line" breed? It is now owned by EWG.

The impacts of this model, with its high level of corporate concentration, are well known. Industrial poultry production in largescale facilities is often associated with widespread disease problems, animal suffering from lack of space, health problems for workers, air and water pollution affecting nearby communities, and deforestation to produce soybeans and maize in countries like Thailand or Brazil. And it is precisely this part of the poultry sector – industrial production – that is growing so fast today.

Inroads into Africa

In 2010, a US NGO worker in Uganda, disillusioned with the aid industry, moved to Ethiopia to join a friend who thought they could make money with chickens. As his partner put it, they were "a couple of suburban kids with zero poultry experience trying to launch a poultry business in Africa."⁵ In their eyes, Ethiopia was a land of "15 million smallholder farmers using nondescript breeds that don't produce enough eggs."⁶ So they set up a company called Ethiochicken, and in less than ten years became a major day-old-chick producer serving smallholder farmers across the country.

The two US men were blessed with massive financing from abroad. Their corporate map reads like a Who's Who of agribusiness financiers, from the Gates Foundation and private equity firms to development banks and Emirati investment houses. The role of Bill Gates in this venture is especially noteworthy. Through his partnership with Ethiochicken, Gates is able to target small-scale farmers and deliver technology as a springboard to improved livelihoods. The technology here is improved genetics, in the form of young chicks. But hidden from view in this fairy tale are a few important facts.

The chicks that Ethiochicken markets are a breed called "Sasso", which is the exclusive property of Hendrix Genetics, run by a private equity group. Sasso is a cross between local African birds and European stock. It's an exotic hybrid, that can be grown both for meat and eggs. Ethiochicken's business model is to replace local breeds with Sasso T451, which they have an exclusive licence on. Like patented seeds, Sasso chicks have to be bought anew – a farmer can't breed them further, because their performance breaks down.

This business of providing elite chicks to farmers often means the chicks are vaccinated [with drugs from multinational pharmaceutical companies] and have special feeding

requirements [which often means soy or maize meal laced with nutritional additives]. In fact, feed is the most important expense for farmers that buy and raise corporate chicks. Ethiochicken specifically targets smallholder women, who need inputs at a specific price point, to raise chickens in backyard conditions. But this focus on the poor hasn't stopped the company from making huge financial returns for its investors – one of them called the company “wildly profitable” – and expanding into five more African countries, quickly becoming a multinational corporation itself.⁷

Nor has it stopped its key investor, Bill Gates, from investing at the same time in large-scale poultry operations. In 2024, he went into business with Sheikh Mohammed Al-Amoudi, an Ethiopian-Saudi investor often cited as Africa's richest businessman.⁸ Al-Amoudi owns MIDROC, an Ethiopian firm that runs the largest poultry farm of Ethiopia, part of Elfora Agro-Industries. Elfora is a vertically integrated and highly intensive farm outfit producing chicken meat, eggs and day-old chicks. [the infograph below shows the overall map of Gates' expanding involvement in the poultry business in Africa.]

Elite poultry breeding opens the door to larger farms, more specialisation and ultimately corporate takeover. As operations grow bigger, we tend to see more devastating impacts from disease and sanitary conditions. South Africa just experienced a nightmare of this sort at one of its largest poultry farms. Daybreak Foods, run by the country's pension fund, ran into a sudden financial crisis. Workers stopped being paid and in no time hundreds of thousands of chickens starved to death.⁹

Another hidden cost associated with corporate concentration in the industrial poultry sector in Africa is economic stranglehold. Analysts rightly point out that European and US regulators are to blame for corporate concentration that Africans have to face, since they are the ones who approve agribusiness mergers at the global level.¹⁰ That concentration brings collusion, cartels and abusive power to fix prices in Africa. Zambia, Malawi and South Africa have seen overpricing, price swings and even the collapse of certain markets due to concentration in poultry genetics and coordination with feed suppliers. In 2024, analysts found that the feed industry in Zambia was paying soybean farmers such low prices, just to pocket the fattest margins for themselves, that farmers stopped planting, causing a market collapse.¹¹ Small scale producers, they point out, have zero bargaining power in this set-up. Corporate concentration plus climate change are turning into a powder keg for poultry producers in Southern Africa.

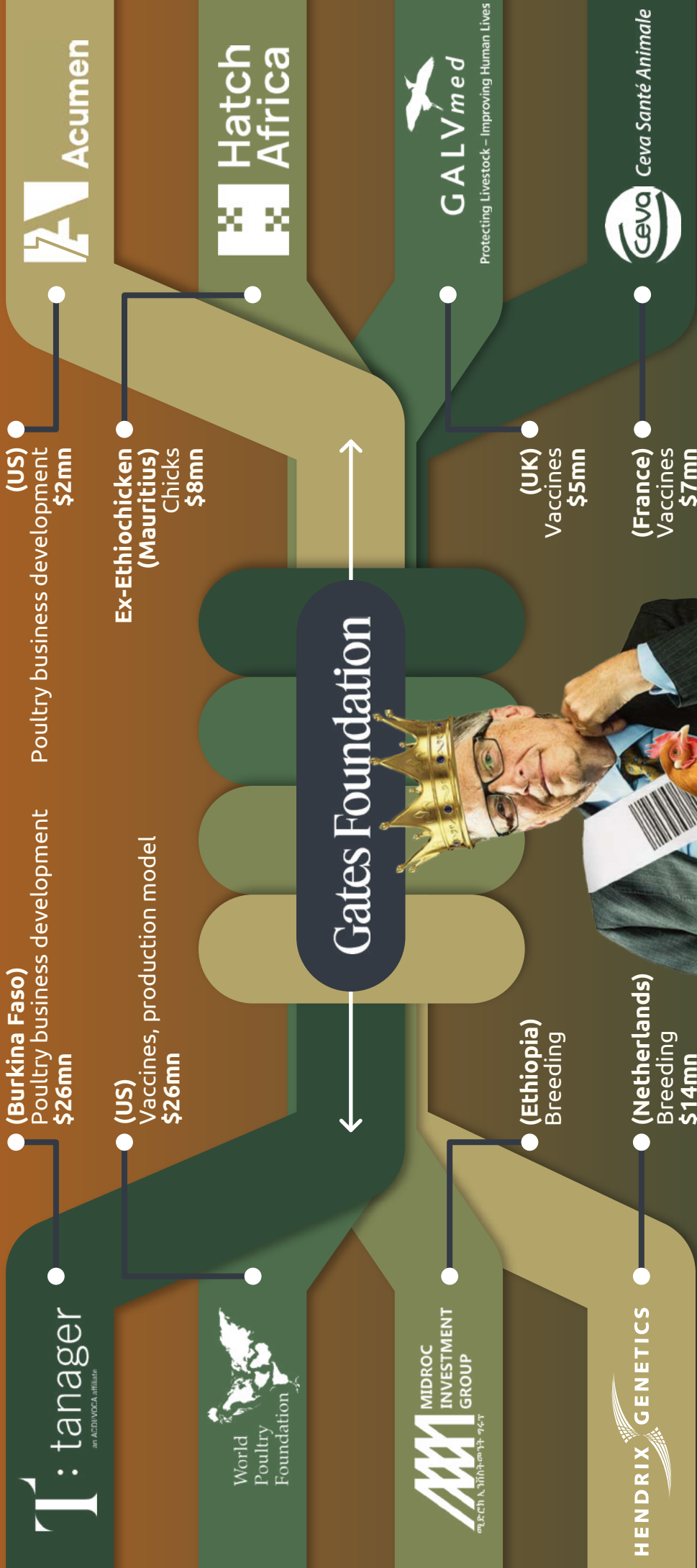
The financial drive to expand this lucrative business in Africa is “on”. For it is the industrial segment of the business where the growth, investment, profit margins, subsidies and policy support are concentrated. The accompanying data show the biggest chicken producers and importers in Africa by country, as well as some of the key corporate players and their financiers. [See Graphs 1 and 2, and Table.] This gives us a picture of how both supply and demand for industrial chicken are currently taking shape.

A course we can correct

Despite the appeal [for some] of industrial production models, 85% of poultry flocks in Africa today are still indigenous birds raised in backyard systems. [See Box.] These birds are mostly kept by women and children, fed by scavenging and household scraps, with little external inputs. Productivity of these birds is low, because of little breeding work, and when they die young it's usually from a local disease or predator. While they constitute the majority, these birds do not count much in policy discussions or trade statistics. Yet, Africa's indigenous chicken biodiversity has so much to offer!

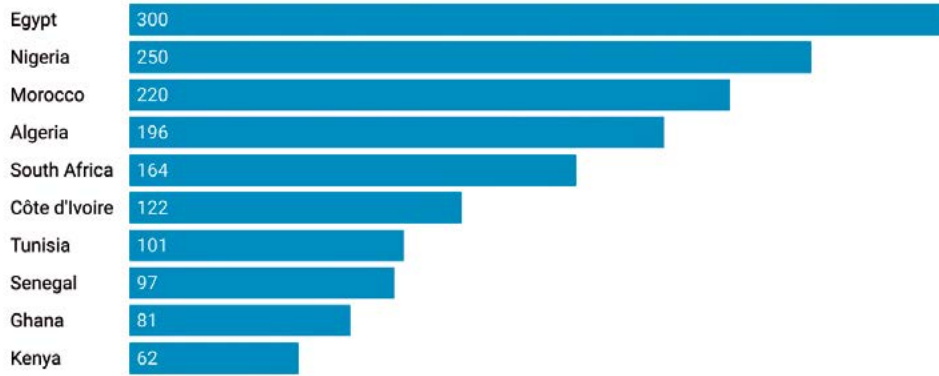
Little has been done to uplift indigenous chicken biodiversity at the local level. In fact, scientists say the biggest threat to local breeds in Africa is indiscriminate cross-breeding

Gates' investments in the poultry business in Africa



GRAPH 1

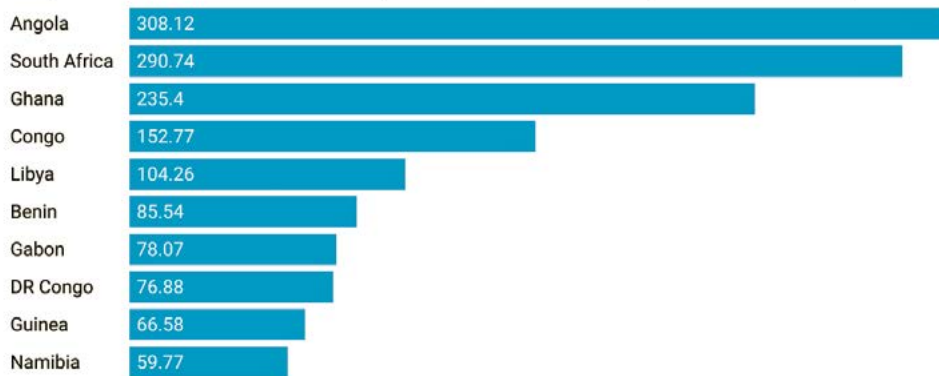
Top 10 chicken producers in Africa (millions of birds, 2022)



Source: Compiled by GRAIN from FAOSTAT, figures rounded - Created with Datawrapper

GRAPH 2

Top 10 chicken meat importers in Africa (tonnes, 2022)



Source: Compiled by GRAIN from FAOSTAT, figures rounded - Created with Datawrapper

between native and exotic birds.¹² The phenomenal work going on with seeds shows that farmer-led approaches to breeding, facilitated by peasant organisations and NGOs, and supported by progressive scientists, can have amazing impacts. Why not open more programmes like these with a focus on livestock, like chickens? With appropriate funding, there is ample space to safeguard Africa’s poultry genetic heritage before it’s too late. Improving local breeds with local communities could strengthen local markets, including workers involved in retail and food service, as we’ve seen in Burkina Faso, where the government has been trying to champion the small-scale indigenous chicken industry.

Public policies can indeed have tremendous impact. Numerous African governments have made the move to stop the importation of frozen chickens – “poulets morgue” or mortuary chickens, as the Beninois call them – into their markets by trading partners, be they international or within Africa itself. This trade is often “dumping” in disguise, and has replaced local poultry production, leading to dependency, market loss for farmers and even health problems. Benin, Namibia, Senegal, South Africa, Tanzania, Zimbabwe and others have taken the bold step to either ban or limit these imports and seen the effects that this can have in supporting local producers. (So, what is holding the government in Accra back?) Strong regulatory action is also needed to reorient subsidies and fiscal packages away from the corporate sector in favour of small producers, and to prosecute collusion and break up corporate oligopolies in the poultry sector.

SOME TOP INDUSTRIAL POULTRY PRODUCERS IN AFRICA (2025)

Company	Country	Comments
Alema Farms	Ethiopia	Ethiopia's second largest broiler producer. Founded and owned by two ex-military figures.
Astral Foods	South Africa	Accounts for 25% of domestic output. Publicly listed. Top shareholder (24%) is Public Investment Corporation, South Africa's pension fund
Cairo Poultry Co	Egypt	Privately owned.
Country Bird Holdings Ltd	South Africa	Astral, Country Bird, Daybreak and Sovereign Foods, combined, are said to account for 63% of South Africa's chicken production, and all four are facing anti-trust investigations.
Daybreak Farms	South Africa	Astral, Country Bird, Daybreak and Sovereign Foods, combined, are said to account for 63% of South Africa's chicken production, and all four are facing anti-trust investigations.. Daybreak is majority-owned by South Africa's pension fund (Public Investment Corporation) along with two other government agencies and is currently in a deep financial and management crisis.
ELORA Agro-Industries Plc	Ethiopia	Considered the biggest commercial poultry enterprise overall in Ethiopia. ELORA is a subsidiary of MIDROC, which is owned by Sheikh Al-Amoudi and now in business with Bill Gates.
Kenchic Ltd	Kenya	Privately owned.
Obasanjo Farms Ltd	Nigeria	Owned by the country's former president, Obasanjo Farms is Nigeria's largest egg producer today. Jointly with Marshall Breeders of India, it developed Nigeria's first broiler breed, the Oba-Marshall.
Olam Agri Nigeria	Nigeria	Subsidiary of Olam Agri, which is now owned by Saudi Arabia's sovereign wealth fund (via SALIC)
Rainbow Chicken	South Africa	Formerly RCL Foods Ltd, now accounts for 18% of domestic output. Publicly listed. Astral, Country Bird, Daybreak and Sovereign Foods, combined, are said to account for 63% of South Africa's chicken production, and all four are facing anti-trust investigations.
Sedima	Senegal	Founded & owned by Senegalese entrepreneur Babacar Ngom, who is allegedly in talks to sell the company to Seaboard – the US agribusiness giant which owns Les Grands Moulins de Dakar – or another buyer
SIPRA	Côte d'Ivoire	Biggest integrated poultry operator. Owned by agribusiness billionaire Jean-Marie Ackah (78%), BNP Paribas (10%), COLINA (Moroccan insurance company) (10%) and employees (2%). Norfund, Norway's development bank, will also now invest €20 million and become an active shareholder.

Company	Country	Comments
Sovereign Food Investments	South Africa	Astral, Country Bird, Daybreak and Sovereign Foods, combined, are said to account for 63% of South Africa's chicken production, and all four are facing anti-trust investigations.
Wadi Poultry	Egypt	Wadi claims a 19% market share across divisions. Owned by two Egyptian families, Freiji and Nasrallah. Japan's Mitsui also owns a share. Dawagen is its semi-integrated poultry division, while Sina'at manufactures poultry feed.
Zalar	Morocco	Biggest integrated poultry operator in Morocco. Owned by the Chouani family, Mitsui and Seaboard Corporation. Recently sold its trading arm to Invictus, the Sudanese-Emirati group aiming to become Africa's new commodity giant.
Zambeef Products Plc	Zambia	The largest integrated poultry producer in Zambia. Listed on the London Stock Exchange. Top shareholders are the UK's development bank BII (17.3%), Africa Life (13.2%), First Equity (8.2%) and Zambia's National Pension Scheme Authority (8.1%).

Compiled by GRAIN from media and industry sources

Finally, it would be wise to close the door on Gates and his private equity buddies, with their skewed ideology about what "modernisation", "development" and "progress" are. These groups are pushing their own interests for their own benefit. African communities should set the agenda to achieve their own visions of food sovereignty and liberation. Let's hope that indigenous livestock, like poultry, have their place in that vision.

Going further

- COPAGEN and GRAIN, "A label for bicycle chicken? Time to ask some questions!", 10 Sep 2021, <https://grain.org/e/6719>, dives further into the role of Gates in poultry in Africa.
- The folks at the Centre for Competition, Regulation and Economic Development, in Johannesburg, are doing great work on monitoring the poultry industry in Africa and pushing for smart anti-trust regulation: <https://www.competition.org.za/>

Box: Key takeaways about the corporate takeover of poultry in Africa

- Three companies control the poultry genetics supply industry, both globally and in Africa: Tyson (US), EW (Germany) and Hendrix (Netherlands). By controlling the physical supply of stock, they don't need to rely so much on intellectual property, contracts, trade secrets or other legal measures.
- Corporate control in poultry genetics is linked to collusion, cartels, price fixing and other actions that hurt farmers and consumers. Some of this malfeasance gets prosecuted, a lot does not.
- Bill Gates is working to replace indigenous poultry stocks in Africa with new hybrids, which in his view are "more productive" and "fantastic". He is targetting both industrial scale systems as well as backyard birds raised by small scale women farmers.
- The "Sasso" dual purpose chicken that Gates champions is a cross between Burkinabè and French breeds. It is produced exclusively in France by Hendrix, and flown by plane on a regular basis to Africa-based licensees.
- About 85% of Africa's chicken flocks are indigenous birds – and 70% of these are managed by women and children. But small farmers and indigenous chickens are NOT the focus of attention in policies and funding for poultry sector development in Africa.
- Chicken is one of the fastest growing farm sectors in Africa but most of this growth is in large-scale operations, not small scale.
- Chicken is the #1 source of animal protein (meat and eggs) in Africa. Not only are chickens easy to raise and affordable, but they play an important role in the cultural, economic and social well-being of both rural and urban communities.
- In Zambia, Burkina Faso and other countries, indigenous chickens are more profitable for small scale farmers than exotic free-ranging breeds. Consumers prefer indigenous breeds for their taste, texture and health benefits, and are willing to pay more for them.
- Coming soon to Africa, "gene editing" is being applied in poultry breeding to control avian flu and to force the sex of offspring (so that hens produce females only, to avoid the culling of male chicks). But few African countries have laws on this. [Speaking of laws, Kenya has a "Poultry breeders' rights" act, but less than 10 registered poultry breeders.]
- Governments can play a powerful role in supporting farmer-led approaches to work with Africa's rich poultry biodiversity and encourage community chicken breeding. As seen in Senegal and Benin, bans on imports of frozen chickens from Europe, US or Brazil really work to protect local producers. And community breeding efforts can manage both disease pressure and the need for appropriate feed, without external inputs.

Notes:

1. Cited in Bert Theunissen, "Beauty or statistics: Practice and science in Dutch livestock breeding, 1900–2000", University of Toronto Press, <https://utppublishing.com/doi/book/10.3138/9781487507008>
2. John C. Culver and John Hyde, "American dreamer: A life of Henry A. Wallace", W.W. Norton & Co., 2001, <https://wwnorton.com/books/9780393292046>
3. The poultry vaccine market has five firms accounting for 65% of the market according to GM Insights, "Poultry pharmaceuticals market", July 2025, <https://www.gminsights.com/industry-analysis/poultry-pharmaceuticals-market>
4. Mehroosh Tak et al, "Identifying economic and financial drivers of industrial livestock production - the case of the global chicken industry", Tiny Beam, 2022, <https://www.issuelab.org/resources/40548/40548.pdf>
5. John Aglionby, "EthioChicken: Ethiopia's well-hatched idea", Financial Times, 16 Mar 2018, <https://www.ft.com/content/54b45d84-e4e2-11e7-a685-5634466a6915>
6. idem
7. These are the words of Jacqueline Novagratz, CEO of the private equity firm Acumen, speaking to The Economic Club of New York on 29 September 2020: <https://www.econclubny.org/documents/10184/109144/2020NovogratzTranscript.pdf>. The German development cooperation sector more sanguinely calls it "low risk, high return": https://wirtschaft-entwicklung.de/fileadmin/user_upload/Downloads/Studie_Milch-_und_Fleischwirtschaft/Ethiopia_country_analysis.en.PDF
8. The ranking changes. See <https://www.bloomberg.com/billionaires/profiles/mohammed-al-amoudi/>
9. National Council of SPCAs, "More than a million chickens abandoned and starving / Daybreak Foods", 6 May 2025, <https://nspca.co.za/more-than-a-million-chickens-abandoned-and-starving-daybreak-foods/>
10. Sumayya Goga and Simon Roberts, "Multinationals and competition in poultry value chains in South Africa, Zambia, and Malawi", Centre for competition, regulation and industrial development, Johannesburg, Aug 2023, https://static1.squarespace.com/static/52246331e4b0a46e5f1b8ce5/t/6551d99f893a2c0601c82a57/1699862946752/Poultry+Antimonopoly+WP_SGSR.pdf
11. Arthur Khomotso Mahuma and Namhla Landani, "High soybean prices in Zambia and Malawi may make chicken costly too: lack of competition is to blame", The Conversation, 18 March 2025, <https://theconversation.com/high-soybean-prices-in-zambia-and-malawi-may-make-chicken-costly-too-lack-of-competition-is-to-blame-250322>
12. Such practices are said to lead to the loss of adaptive traits in indigenous poultry populations, reduced diversity, unpredictability for small farmers and ultimately lower resilience. "Poultry in the 21st century", FAO, 2008, <https://www.fao.org/4/i0323e/i0323e01.pdf>

Cover photo: Chicken in Maasai homestead in Kitengela, Kenya (Flickr/ILRI/Stevie Mann)



GRAIN is a small international non-profit organisation that works to support small farmers and social movements in their struggles for community-controlled and biodiversity-based food systems. GRAIN produces several reports each year. They are substantial research documents providing in-depth background information and analysis on a given topic.

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GRAIN

Casanova 118, escalera dcha. 1ºB, 08036 Barcelona, Spain

Tel: +34 93 301 1381

Email: grain@grain.org