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Catherine Laroche-Dupraz, Cyprien Awono-Bessa

### **► To cite this version:**

Catherine Laroche-Dupraz, Cyprien Awono-Bessa. Patterns and determinants of urban chicken consumption in Haiti and Cameroon: Similar context, Differentiated prospects. 12. Congress of EAAE, European Association of Agricultural Economists (EAAE). INT., Aug 2008, Ghent, Belgium. 5 p. <hal-01462365>

**HAL Id: hal-01462365**

**<https://hal.science/hal-01462365v1>**

Submitted on 6 Jun 2020

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# Evolution of urban chicken consumption in Southern countries: a comparison between Haiti and Cameroon

## 1. Introduction

Since the beginning of 2000s, in order to open the market and let poor people to accede to meat consumption, several African countries have reduced tariffs on chicken imports. The resulting competition between frozen pieces of chicken, mainly imported from the European Union or Brazil, and local chicken, has been denounced by several non governmental organisations and associations because it caused the collapse of many poultry husbandry and the loss of jobs in the local chicken food chain. They notably recommend coming back to previous situation by reinstating high level of border tariff protection against imports of chicken pieces. This position is reinforced by the frequent use export subsidies on Brazilian or European chicken supply, which is then considered as an unfair practice beside local chicken production.

Before thinking about possible protection or support policy instruments to help African local chicken industry, it seems necessary to be sure that local flesh chicken still has its place in urban chicken consumption. The aim of this paper is then to highlight the determinants of urban consumer's choice relative to chicken types, in order to assess the opportunity for local chicken to restore its market share in a competitive context.

Beyond the question of price competitiveness, which would suppose to know precisely the chicken production costs, we have chosen to analyse the question of the competition from the demand point of view. A rapid observation of African food markets highlights the differences between local chickens and imported ones. Taking the cases of Cameroon or Haiti, three main commodities are supplied to urban consumers:

- Rustic ("Villageois") chicken in Cameroon, which is also called "Creole" in Haiti, is produced at family home, in only precarious shelter. In Cameroon, rustic chicken is most often breed in rural areas, and it is sold alive directly to the consumer or via peri-urban markets after being collected at the village. In Haiti, one can find Creole chicken in urban market places.

- Local flesh chicken, sometimes called “White chicken” in Haiti, is produced in semi-industrialized farms. Production chain, feeding, sanitary and veterinary following are rationalized, and animals live in permanent structures. It is sold alive at traditional urban markets. That type of chicken has been, for few years, actually very hard to find in Haiti, whereas it still exists in Cameroon. In some rare supermarkets in Yaoundé, one can find whole local flesh chicken sold ready to cook.
- Imported chicken are usually sold frozen and by pieces at traditional urban markets, supermarkets or fish shop (which have freezer). One can also find entire frozen chicken.

Two similar investigations of eight weeks have been done successively in Yaoundé (Cameroon) and Port-au-Prince (Haiti). Representative sample urban households and restaurant’s consumers have been polled about the evolution of their chicken consumption, since the entry of frozen imported chicken pieces in the local market: preferences, habits, evolution, and willingness to pay for a chicken or a chicken meal. The second section of the paper presents the methodology of investigations. The third section presents main results dealing with determining aspects of the recent evolution of chicken consumption. The forth last section concludes, focusing on the perspectives, for local chicken, to restore their previous urban consumption share, in Cameroon and Haiti.

## **2. Investigation Framework**

In 2005, May 21<sup>st</sup> to July 21<sup>st</sup> in Yaoundé, and in 2006, June 19<sup>th</sup> to August 19<sup>th</sup> in Port-au-Prince, the same investigation has been done among a sample of 180 urban households and 180 restaurant consumers<sup>1</sup>. In order to have representative samples, method of quotas has been applied, using control variables (or criteria) which are known for the global population. Available statistical data have been taken from IHSI (2003), ECAM (2000) and INS (1993). Criteria chosen for household quotas were following: householder sex, household size, socio-professional categories, and types of housing

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<sup>1</sup> In Cameroon, home-out food consumption mainly concerns lunch in the middle of a working day. In Haiti, lots of poor families don’t have enough money to take more than only one meal at home with the entire household. That encourages some members of the family to complete their alimentation by buying food dishes outside when they have money for that. This way of home-out food consumption often takes place in the evening and does not present the same characteristics as the lunch home-out food consumption. That is why both have been treated separately in Port-au-Prince survey. Note that Haitian survey has been made in a very difficult context of urban violence and high level of insecurity: the respects of statistic quotas of polled people actually constituted a real challenge.

(equipment and infrastructures available). For restaurant consumers, sex, age, and socio-professional category have been taken. Geographical distribution of polled people in each city has also been taken into account by applying the itineraries method, which set the localisation of inquiries by advance on a map, in correspondence with the global distribution of the population in respect to demographic weight of the sites of investigations and/or places of consumption. Collected information is of qualitative type (observations/talks) and quantitative (investigations/surveys).

Boxes 1 and 2 briefly present Yaoundé and Port-au-Prince.

**Box 1: Yaoundé (Cameroon)**

Yaoundé, also called “the city of seven hills”, has been the administrative and political capital of Cameroon since 1922. After Douala, which is considered as the economical capital, Yaoundé constitutes the second biggest city of Cameroon, and is the county town of Mfoundi Department and of Centre Province. Historically, Yaoundé is composed by four districts.

*Yaoundé 1<sup>st</sup>*, 490 000 inhabitants in 2001, is in the north of Yaoundé. That is the headquarters of the Presidency of the Republic and of the province. It is composed by both popular areas (*Etoudi, Nlongkak, Mvog-Ada, Essos*) in the north and residential area (*Bastos*) in the South.

*Yaoundé 2<sup>nd</sup>*, 500 000 inhabitants in 2001, is located at the West part of Yaoundé. In the North, *Tsinga* and *Mont-Fébé* are residential areas, but the main part of population live in very popular areas (*Mokolo, Briqueterie, Melen, Nkomkana*).

*Yaoundé 3<sup>rd</sup>*, 172 000 inhabitants in 2001, is actually the “old Yaoundé”. Located in the centre and South-West of the city, it was the headquarters of German and French authorities. It now houses all public administrations and concentrates major part of shops. Downtown is mainly constituted by buildings and residential areas, whereas the South-West concentrates a large part of population in popular areas (*Mvolyé, Efoulan*).

*Yaoundé 4<sup>th</sup>*, 344 000 inhabitants in 2001, is located in the Eastern and South-Eastern part of the capital. There are there several popular areas (*Nsam, Mvog-Mbi, Nkoldongo, Kodengui*), the airport and several agro-industry head offices.

Since 2007, Yaoundé is cut into seven districts. *Yaoundé 5<sup>th</sup>, 6<sup>th</sup> and 7<sup>th</sup>* respectively come from the reorganisation of *Yaoundé 2<sup>nd</sup>, 4<sup>th</sup> and 1<sup>st</sup>*.



## Box 2: Port-au-Prince (Haiti)

Port-au-Prince, more than 1.2 millions of inhabitants, is the political, administrative, and economic capital of Haiti. It is also the capital of the West Region and one of the 130 districts of the island. Port-au-Prince district has been cut into four administrative “communes” : *Delmas*, *Pétion-ville*, *Carrefour*, *Port-au-Prince commune*.

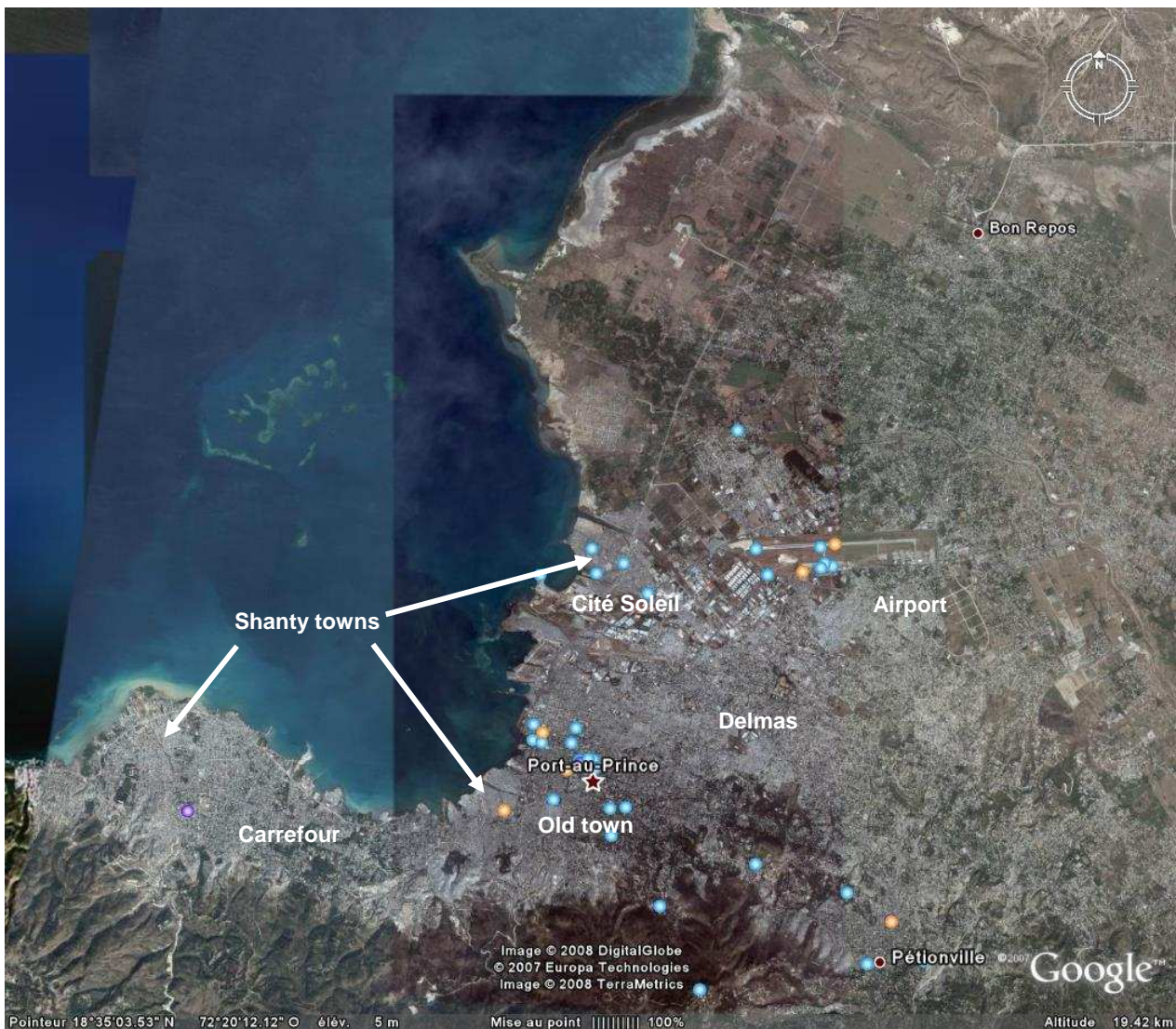
Commune of *Port-au-Prince* is the headquarters of public institutions (Presidency, Ministries and other republican services), universities, cultural centres and museums; that is the “old town”. All other communes of Port-au-Prince district actually are suburb areas growing with demographic pressure. The town has been built on many hills and there is like a “positive gradient of richness with the altitude of accommodation”.

Port-au-Prince commune is located under little mountains: the Mornes. Except administrative offices, the commune is bordered by several very large shanty towns where there is high level insecurity (*Martissan*, *Carrefour-Feuille*, *Cité l’Eternel*).

*Pétion ville* is at the South suburb of Port-au-Prince, at the top of a hill. This area has been a place of holidays for a long time. It is composed by luxurious villas and constitutes the rich part of the city.

*Delmas* takes place in the northern part of Port-au-Prince. That is the real industrial heart of the town with the port, the airport, the industrial area and the head offices of many societies and firms. Near to the airport, there are huge shanty towns: *Cité-Soleil* at the West, which actually constitutes a no-rights area, with very high insecurity, and *Maïs-Gâté* in the South.

Carrefour is the more southern commune of Port-au-Prince district. Although it is bordered by shanty towns (*Brochette*, *Mon Repos*), this part of town is very quiet, and houses many beaches and touristy sites.



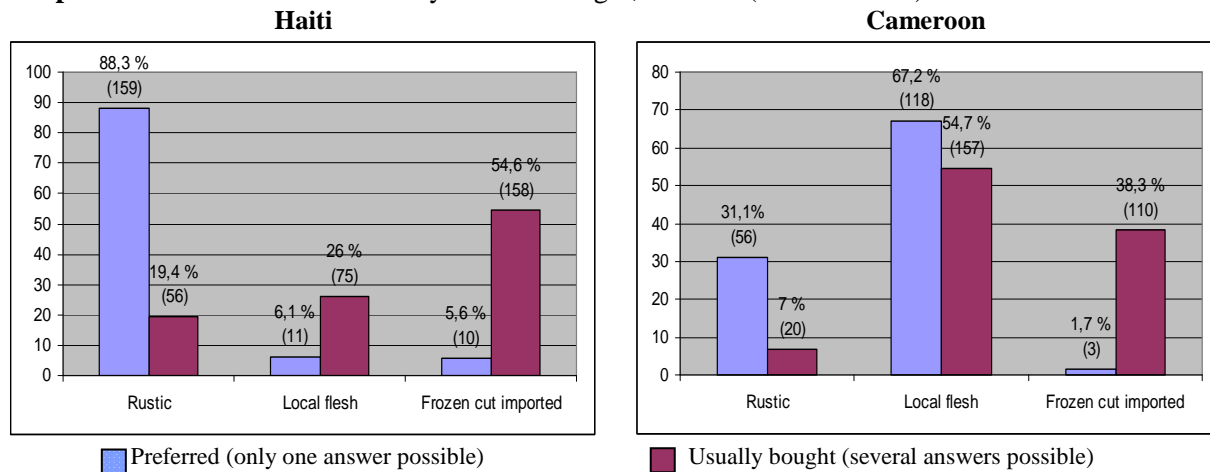
Source: Authors, from Google Earth 2008

### 3. Results of the surveys

#### 3.1. Preferences and habits of urban consumers

Graphic 1 presents preferences of household consumers relative to type of chicken out of price matter, and types of chicken actually bought by households from Port-au-Prince and Yaoundé. Graph 2 presents preferences declared by consumers especially at restaurant, out of price matter.

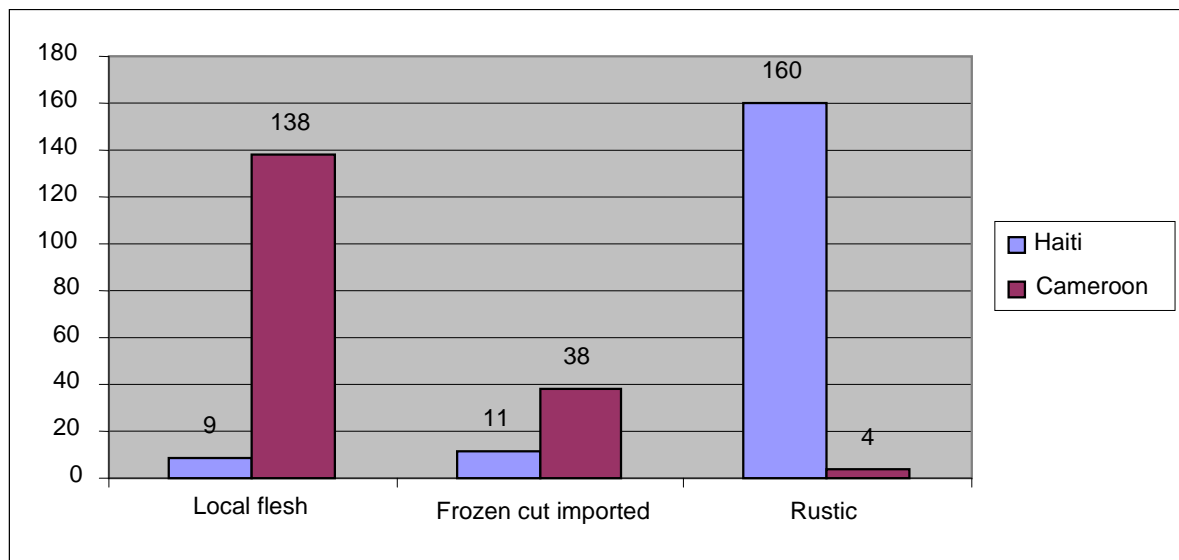
**Graph 1.** Preferences *versus* actually chicken bought, at home (% of answers)



Source: Household survey

In brackets: total number of answers (at least, more than 180)

**Graph 2.** Preferences, at restaurant (number of answers)



Source: At restaurant survey

In Port-au-Prince, 90% of chicken consumers declare they prefer the rustic (Creole) to others chicken type, out of price matter. That result is very different in Yaoundé where only one third of households

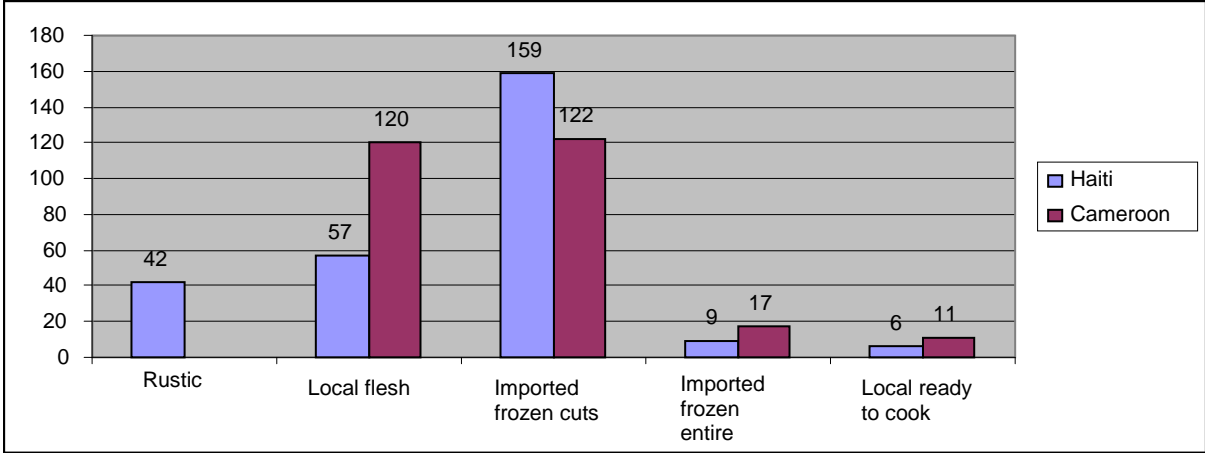
and 2% of consumers at restaurant say they prefer rustic chicken. In Haiti, local flesh chicken and cut frozen imported chicken are preferred by only 6 % each. On the contrary in Cameroon, local flesh chicken is actually preferred by consumers.

About two-thirds of Yaoundé or Port-au-Prince home-out chicken consumers declare they actually do not know the type of chicken (local *versus* imported ones) they have been served, whatever the type of restaurant they are in. Restaurant holders have actually confirmed they do not systematically mention the type of chicken served.

Results show the difference between declared preferences, out of price matter, and the reality of consumption. At home, 86% of households in Haiti (corresponding to 54 % of total answers) and 53 % of households in Cameroon (38 % of answers) say they usually consume imported frozen chicken cuts. In Yaoundé, 80 % of consumers (55% of answers) usually consume local flesh chicken; they are only 40 % (26 % of answers) in Port-au-Prince, and correspond to occasional consumptions. Rustic chicken is occasionally consumed in Haiti by 32 % of households (19 % of answers); they are only 10 % in Cameroon. That let us think there has actually been a substitution between types of chicken but an imperfect one.

Graph 3 gives the types of chicken chosen especially for festive meal (traditional ceremonies for example). Although they clearly would prefer consume local chicken, more than two-thirds of consumers in Haiti, and about the half in Cameroon, declare they buy imported frozen cuts for festive meals.

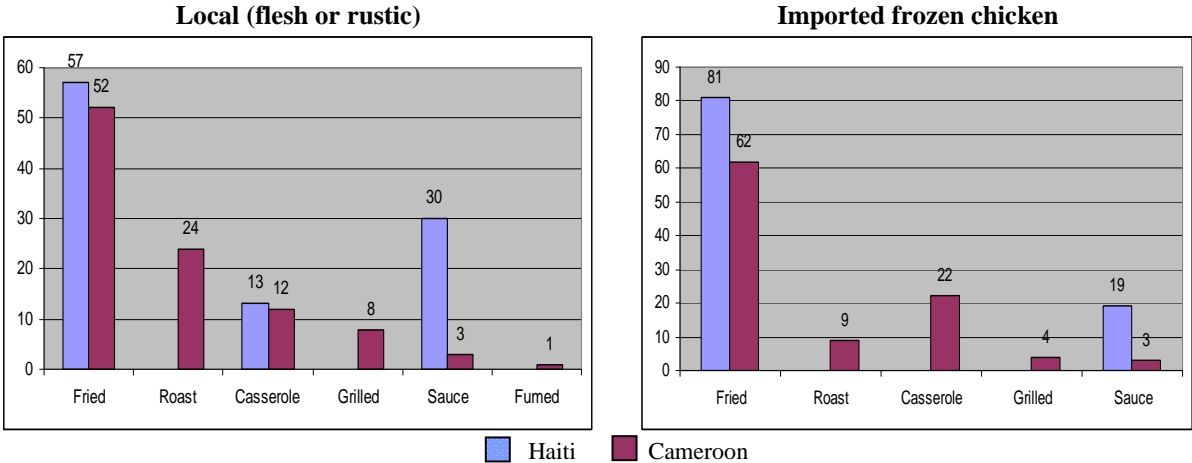
**Graph 3.** Type of chicken chosen especially for festive meal (number of answers)



Source: Household survey (multiple answers possible).

In households, local flesh chicken or imported frozen cuts may be fried, roasted, cooked at casserole, grilled or fumed, or used to cook a chicken sauce. Graph 3 and graph 4 present the most usual mode of cooking adopted by polled households for imported frozen cuts *versus* local flesh chicken.

**Graph 4.** Most usual mode of cooking local *versus* imported chicken at home, in Haiti and Cameroon, % of answers



Source: Household survey

In both countries, fried chicken clearly seems to be the most usual mode of cooking the chicken, whatever type of chicken. Note that cut chicken is particularly adapted to that particular mode of cooking: cuts are practical and easier to fry than a whole chicken. On the contrary, roasted and fumed chicken, which are well adapted to entire chicken, are used only in Cameroon, not in Haiti. Making a chicken sauce requires only a little quantity of chicken for a lot of people, frozen cuts are well adapted to that use. This mode of cooking the chicken is more developed in Haiti than in Cameroon.

**3.2. Willingness to pay for each type of chicken**

Table 1 compares average household consumers willingness to pay for each type of chicken. In coherence with use, willingness to pay for imported frozen cuts are given in kilogram’s, and those for rustic and flesh chicken are given for a whole chicken, without having been weighted before. Table 2 presents average willingness to pay the main chicken meals proposed at restaurants in Yaoundé and Port-au-Prince.

**Table 1.** Willingness to pay for each type of chicken as presented on urban markets

Types of chicken	Average willingness to pay the chicken (€)	
	Haiti	Cameroun
Rustic (alive and entire)	6.96	5.38
Local flesh (alive and entire)	5.02	5.12
Imported frozen (entire)	4.82	3.59
Local flesh (entire, ready to cook)	-	4.34
Imported frozen cuts (kg)	1.36	2.09

Source: Average of household survey results. Conversion in euro of each local currency

Price order and levels are quite similar in Cameroon and Haiti, even if cut frozen import chicken seem to be cheaper at Port-au-Prince than in Yaoundé. Nevertheless, rustic but also flesh local chickens are everywhere clearly more expensive than imported chicken.

**Table 2.** Willingness to pay chicken meals at restaurant

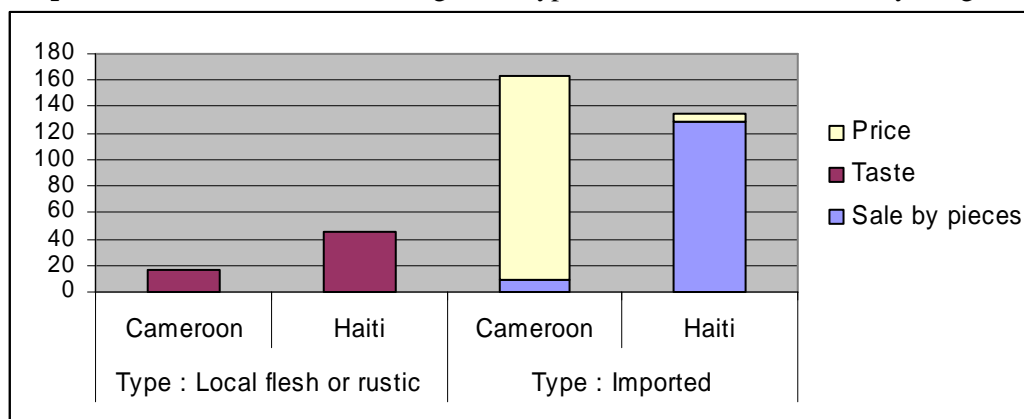
Chicken meals	Average willingness to pay the meal (€)	
	Haiti	Cameroon
Casserole	2.56	3.36
Fried	2.32	2.27
Fumed	-	6.10
Grilled	-	3.81
Roast	2.18	3.85

Source: Average of home out survey results. Conversion in euro of each local currency

Average Haitian willingness to pay a chicken meal is between 2.18 € for roast chicken and 2.56 € for casserole chicken. This value is higher than the price of one kilogram of imported cut chicken (1.36 €). Grilled or fumed chickens, which are only made with local flesh chicken, constitute the most expensive meals in Cameroon and are often reserved to well-off customers. Whereas they may constitute trade “niches” in Cameroon, such luxurious meals don’t exist in Haiti.

### 3.3. Criteria of choice

**Graph 5.** Criteria of choice according to the type of chicken the most usually bought



Source: Household survey

In Port-au-Prince, more than two-thirds of consumers declare they choose the imported frozen chicken because it is sold by pieces, giving low income households the possibility to buy only few pieces instead of at least a whole chicken. As a result, Haitian consumers do not present the price as the main determining criteria of buying imported frozen chicken. Note that when the survey has been realised in Port-au-Prince, imported frozen cut chicken already were considered as a banal commodity available on markets regularly along the year, contrary to other types of chicken which availability was less regular and presenting price fluctuations (Chancy, 2005). At the time of survey, local flesh chicken was particularly difficult to find and very seldom consumed by households, although it had been regularly consumed five years earlier. There still remain few Haitian households, corresponding to local chicken consumers, declaring the taste as their main choice criteria. Those atypical answers are statistically related to high income households.

In Cameroon, people feel they really have the choice. For 86 % of consumers in Yaoundé, the type of chicken chosen is determined by the price. Imported chicken actually constitutes a substitute to local flesh chicken. If its revenues are high enough, consumer would mainly prefer buying the local flesh chicken to the imported one, local flesh chicken already being a substitute to rustic chicken, which is more difficult to find and more extensive.

### ***3.5. Recent evolution of the place of chicken in global alimentation***

Several consumers polled in Yaoundé, and a lot of in Port-au-Prince, have declared that chicken was the most appreciated food. Those people have insisted to explain that supplying cooked chicken pieces to hosts is very important to give good impression. Furthermore, for polled households in Port-au-Prince, cheap imported frozen cuts actually give the possibility to Haitian households to supply meat to the entire family. Chicken is considered as an accessible substitute commodity to other expensive meat. A look at meat prices in Haitian markets, and Chancy (2005) let us confirm that chicken meat is the cheapest one. However we don't know any precise study which would give elements to measure to what extent the increasing of chicken consumption may affect other meat consumption, *versus* makes global meat consumption growing by giving the possibility to poor household to buy meat.

53 % and 58 % of households, respectively in Cameroon and Haiti, have declared their chicken consumption have changed for the last five years. In Yaoundé, for one third of those households, chicken consumption has globally increased; only 8 % are in that case in Port-au-Prince. 45 % of concerned consumers in Haiti and 25 % in Cameroun declare they just have changed the type of chicken they use to buy for the five last years. In Haiti, polled consumers talk about substitution occurred between rustic chicken and imported cuts. They do not mention the eviction of local flesh chicken any more; that previous substitution already apparently belongs to the past. While in Cameroon, consumers declare imports cuts recently have replaced local flesh chicken. To the question "what would replace the wanted type of chicken, if it was not available?", 52 % of Cameroon consumers have answered imported chicken, while in Haiti, cut imported chicken cuts are not more considered as a substitute than fish, goat or vegetables. That last item – vegetables-, only mentioned as a chicken substitute in Port-au-Prince, underlines the poor purchase power of a sensible part of population in Haiti, who replaces meat by vegetable.

Households polled have mentioned a tradition, coming from forest people, which certainly participates to maintain the entire local flesh chicken on tables at family meals in Cameroon, by instituting a particular chicken sharing out. Gizzard, heart, wishbone and foots are given to the householder: it would be particularly very bad felt to offer a chicken without wishbone to a householder. Wings are

for young ladies (they have to prepare themselves to fly away getting married later); chicken legs are due to young boys. At last neck and rump are for housewife who has cooked the meal. Imported chicken, sold by pieces, is inappropriate to that traditional allocation.

Such a sharing out has not been met in Haiti where, since 1991, the crisis of local chicken industry has introduced a deficit of supplying urban markets in local flesh chicken (Chancy, 2005). Lots of Haitian consumers polled have declared that sale by pieces of imported chicken was a way to eat chicken at low costs, choosing only the interesting wanted piece. Moreover, the use of common familial meals seems to decrease via the development of a new form of individual home outside fast food for low income households. One can actually observe the large development of local informal “fast food” in Port-au-Prince where the main proposed meal is an imported cooked chicken piece. Hot chicken meal is served in « *boites manjé* » (Polystyrene box with lid) to customers who don’t want to sit on place. In the same time, rustic Creole chicken is still usual in Haiti, and is the only chicken appropriate for voodoo ceremonies.

#### **4. Conclusion**

The empirical work, based on two similar surveys in Port-au-Prince (Haiti) and Yaoundé (Cameroon), aimed to identify determinants of recent evolution of chicken consumption in urban area of developing countries, in order to answer following questions. Do the recent and massive imports of frozen chicken cuts modify food habits? Are the effects similar in both countries relative? Suppose that a national public policy would have the objective to help local chicken industry to recapture lost market shares, are conditions favourable, dealing with the demand aspects?

In conformity with previous studies (Agir Ici, ACDIC) which describe the crisis of chicken industry occurred since the opening to frozen chicken imports, in both countries surveys confirm that the relative lower cost of imported chicken has introduced a substitution of imports for local chicken.

However the effects of such a competition differ from Cameroon to Haiti. Cameroon local flesh chicken supply still remains available, while in Haiti, rationalised local chicken industry (and supply) has quite entirely disappeared. Hence Yaoundé consumers still have the choice between local flesh

chicken and imported frozen one, rustic chicken being difficult to find in urban area. On the contrary at Port-au-Prince, the choice of consumers exists only between rustic (Creole) chicken and imported frozen chicken, because local flesh chicken are not available any more.

In Cameroon, local flesh chicken industry is weakening, but still exists. Moreover, out of price considerations, Yaoundé consumers display a preference for local chicken for their chicken meal at home and home out. While chicken cuts are well adapted to usual chicken consumption, local entire chicken still remains necessary for traditional familial meals. For those particular uses, local flesh chicken is a second best choice if rustic chicken is not available. In other words, it seems there is still a place in Cameroon urban consumption for local flesh chicken, because the latter presents specific attributes of which imported chicken is lacking. Two conditions for boosting local chicken supply are necessary: i) Local chicken mustn't be more expensive than imported chicken. In that view, the re-introduction of tariff barriers against imports may be justified to safeguard local industry. Margins of manoeuvre to negotiate with trade partners at WTO and through bilateral agreements have to be precisely inspected; ii) Consumers have to be informed about the origin of chicken they buy or eat, especially in restaurants.

In Haiti, rationalised local flesh chicken industry does not really exist anymore and it seems that corresponding demand has quite completely disappeared in urban areas. Surveys show that massive imports of frozen chicken at low price have already changed food habits relative to chicken consumption and urban Haitian households have appropriated this new commodity. Frozen cuts are not more considered as substitutes for local chicken but have simply replaced local flesh chicken (cuts are practical to cook), and captured new low income consumers giving the possibility to buy only few pieces instead of a whole chicken. No aspect of recent evolution of Haitian urban demand seems to play in favour of local rationalised flesh chicken. Creole rustic chicken, which is still presented on urban markets, is much more expensive than imported chicken, and not accessible to poor households, but still beneficiates from preference of some consumers at least for some particular local uses. Has rustic Creole chicken to be developed through public support? Other actors of poultry industry met in Haiti confirm the local rationalised flesh chicken industry would be very difficult to re-introduce in the

market competition and purpose to target eggs industry which would be more in ad equation with national demand (Chancy, 2005).

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