PRELIMINARY RESULTS OF FINANCIAL ANALYSIS ON POULTRY SUPPLY CHAINS IN HANOI SUBURB, NORTH – VIETNAM

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Introduction
From early 2004, the poultry producers in Vietnam had to adapt to the context of avian influenza (HPAI) for a better responding to the demand of market. This research aimed at analyzing the explicative factors of poultry development at local level through an identification of poultry farming systems and supply chains with their various constraints.

Methodology
280 poultry farms and 100中间人物 at different scales were selected based on the agro-ecological patterns and the diversification of poultry farming systems at three districts of Thuong Tin, Phu Xuyen and Chuong My between 2009-2010. Financial analysis approach in different agents was used to calculating the value-added in poultry commodity chains.

Results and Discussions

Table 1. Broiler poultry farming systems at research region

<table>
<thead>
<tr>
<th>Broiler poultry farming systems</th>
<th>Sub-systems</th>
<th>Heads /farm/year</th>
<th>Producers (% farms)*</th>
<th>Production (% products) *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broiler industrial chicken by contract farming</td>
<td>Broiler industrial chicken</td>
<td>4,800 – 19,500</td>
<td>&lt; 0.1%</td>
<td>15%</td>
</tr>
<tr>
<td>Broiler poultry production at commercial scale</td>
<td>Local with cross-bred chicken races</td>
<td>300 – 600</td>
<td>9.9%</td>
<td>15 – 20%</td>
</tr>
<tr>
<td></td>
<td>Broiler ducks and Muscovy ducks</td>
<td>500 – 10,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poultry production at smallholders</td>
<td>80 – 200</td>
<td>90%</td>
<td>50 – 65%</td>
<td></td>
</tr>
</tbody>
</table>

Table 2. Profit of broiler industrial chicken supply chain by contract farming and at commercial scale

Table 3. Profit of broiler local chicken supply chain at smallholders

Fig. 2 Broiler supply chains in region of research

Broiler industrial chickens par contract farming, commercial scale
- The enterprises supplied day old chicks (DOCs), animal feed, vaccines, veterinary drugs and technicians with contract farming.
- These recent years, broiler industrial chickens and ducks met with some difficulties with the profits were very unstable or loss-making.
- Color broiler chickens were chosen for more satisfying the demand of domestic consumers.
- If contract farming has a profit without familial labor of 237 thousand Vnd per 100kg of live chickens, color or cross-bred broiler chickens at semi-commercial scale has a profit of 2,125 thousand Vnd; and broiler ducks has a profit of 111.4 thousand Vnd.

Broiler chicken production at smallholders
- Village or backyard poultry production has a low investment, free poultry ranging with some races were raised in the same smallholders.
- Price at farm gate was always higher than other birds by Vietnamese taste but an important part of production is reserved for self-consumption.
- The risks with epidemic disease was great by a low knowledge of farmers.

Conclusions
Poultry supply chains in this region is really complex. Local or color cross-bred broiler chickens have a good economic performance but the output is still instable. Industrial broiler chicken occupies more and more an important role but their economic profits has unsettled caused by a large fluctuation of inputs/outputs and epidemic diseases. Manual slaughter-house has a good economic performance caused by source of familial labor and selling directly to consumers.

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