Multidisciplinary Research Journal
ISSN : 3088-5205
https://jorep.net

Volume: 2
Issue: 5
Year: 2026
Month: 10

Determinants of competitiveness in Burkina Faso's modern poultry sector amid import dependency on strategic inputs: a value Chain and Governance analysis

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ABSTRACT

This study examines the determinants of competitiveness in Burkina Faso's modern poultry sector, focusing on the sector's dependency on imported strategic inputs and the governance arrangements that shape value chain performance. Using a mixed-methods approach combining value chain analysis, governance assessment, and secondary data review, this study analyzes the structural constraints that have historically undermined the competitiveness of domestic poultry production despite strong and growing demand. The analysis reveals that dependence on imported day-old chicks and feed ingredients particularly maize, fishmeal, and soybean meal constitutes the principal determinant of cost structures and competitive positioning. Prior to October 2025, Burkina Faso imported an average of US$736,000 worth of broiler chicks annually, with imports reaching US$1.06 million in 2024, primarily from Morocco, Belgium, France, and Turkey. Feed costs represent approximately 80 percent of intermediate consumption in modern poultry operations, with maize prices fluctuating between 80–90 FCFA/kg during abundance periods and 150 FCFA/kg during lean seasons. The study finds that the governance structure of the value chain is characterized by weak vertical coordination, fragmented producer organization, and limited contractual arrangements between input suppliers, producers, and buyers. The October 2025 government suspension of broiler chick imports and the subsequent inauguration of domestic hatcheries, including a US$1.2 million facility in Bobo-Dioulasso with projected capacity of one million hatching eggs in 2026, represent a significant policy shift that may reshape competitive dynamics. However, the study argues that without addressing feed input dependency, strengthening producer organizations, and improving access to finance, the sector's competitiveness will remain constrained. The findings contribute to the literature on agri-food value chain governance and import substitution in West Africa.

Keywords: Poultry sector competitiveness, value chain governance, import dependency, strategic inputs, Burkina Faso, food sovereignty, day-old chicks, feed costs

RESUME

Cette étude examine les déterminants de la compétitivité du secteur avicole moderne au Burkina Faso, en se concentrant sur la dépendance du secteur aux intrants stratégiques importés et les arrangements de gouvernance qui façonnent la performance de la chaîne de valeur. Utilisant une approche mixte combinant l'analyse de la chaîne de valeur, l'évaluation de la gouvernance et l'examen des données secondaires, cette étude analyse les contraintes structurelles qui ont historiquement sapé la compétitivité de la production avicole nationale malgré une demande forte et croissante. L'analyse révèle que la dépendance aux poussins d'un jour importés et aux ingrédients d'aliments—notamment le maïs, la farine de poisson et le tourteau de soja—constitue le principal déterminant des structures de coûts et du positionnement concurrentiel. Avant octobre 2025, le Burkina Faso importait en moyenne 736 000 dollars américains de poussins de chair par an, les importations atteignant 1,06 million de dollars en 2024, principalement en provenance du Maroc, de la Belgique, de la France et de la Turquie. Les coûts des aliments représentent environ 80 pour cent de la consommation intermédiaire dans les opérations

avicoles modernes, les prix du maïs fluctuant entre 80–90 FCFA/kg pendant les périodes d'abondance et 150 FCFA/kg pendant les périodes de soudure. L'étude constate que la structure de gouvernance de la chaîne de valeur est caractérisée par une faible coordination verticale, une organisation fragmentée des producteurs et des arrangements contractuels limités entre fournisseurs d'intrants, producteurs et acheteurs. La suspension gouvernementale d'octobre 2025 des importations de poussins de chair et l'inauguration subséquente de couvoirs nationaux, dont une installation de 1,2 million de dollars à Bobo-Dioulasso avec une capacité projetée d'un million d'œufs à couver en 2026, représentent un changement politique significatif qui pourrait remodeler la dynamique concurrentielle. Cependant, l'étude soutient que sans s'attaquer à la dépendance aux intrants alimentaires, au renforcement des organisations de producteurs et à l'amélioration de l'accès au financement, la compétitivité du secteur restera contrainte. Les résultats contribuent à la littérature sur la gouvernance des chaînes de valeur agroalimentaires et la substitution des importations en Afrique de l'Ouest.

Mots-clés : Compétitivité du secteur avicole, gouvernance de la chaîne de valeur, dépendance aux importations, intrants stratégiques, Burkina Faso, souveraineté alimentaire, poussins d'un jour, coûts des aliments

Submitted: 6 25, 2026
Published: 10 13, 2026
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1. INTRODUCTION

1.1 Background

The poultry sector occupies a central position in Burkina Faso's agricultural economy and rural livelihoods. Poultry accounts for 49.5 percent of the national livestock population, which stood at nearly 71 million animals in 2023. The livestock sector contributes approximately 12 percent to national GDP and provides employment for around 72 percent of the population. Poultry production represents about 6 percent of agricultural value added, with the country producing more than 140,000 tonnes of poultry meat and approximately 6,000 tones of eggs annually. Poultry meat contributes 16.5 percent of total meat consumption nationwide.

The sector is characterized by a dualistic structure. Extensive village production systems account for 98 percent of the poultry flock and 99 percent of poultry farmers, supplying 99 percent of meat and 86 percent of egg production. These traditional systems, while important for household food security and income, are characterized by low productivity, with native breeds laying approximately 40 eggs per year and carcass weights rarely exceeding one kilogram. In contrast, the modern or intensive sector, comprising approximately 328 farms concentrated around major urban centers, represents less than 2 percent of meat production but 14 percent of egg production. These modern operations achieve significantly higher productivity, with laying rates of up to 220 eggs per year and carcass weights of 2 kilograms at 36–42 days.

1.2 Problem Statement

Despite strong and growing demand for poultry products, driven by population growth, urbanization, and rising incomes, Burkina Faso's modern poultry sector has historically struggled to achieve competitiveness. A fundamental constraint has been the sector's dependence on imported strategic inputs, particularly day-old chicks and feed ingredients. Until October 2025, Burkina Faso had no domestic hatchery capacity for broiler chicks, with all day-old chicks imported from Europe (primarily Belgium and France) or neighboring countries. Trade data indicate that Burkina Faso imported an average of US$736,000 worth of chicks annually between 2020 and 2024, with imports reaching US$1.06 million in 2024, sourced primarily from Morocco, Belgium, France, and Turkey.

Feed costs constitute the largest single expense in modern poultry operations, representing approximately 80 percent of intermediate consumption. The principal feed ingredients maize for energy, and cottonseed cake, fishmeal, and soybean meal for protein are either imported or subject to significant price volatility. Maize prices fluctuate between 80–90 FCFA/kg during periods of abundance and 150 FCFA/kg during lean seasons, creating substantial uncertainty for producers.

The governance of the poultry value chain has been characterized by weak coordination among actors, limited vertical integration, and fragmented producer organization. These governance weaknesses have constrained the sector's capacity to respond to competitive pressures and to capture value from growing domestic demand.

1.3 Study Objectives

This study addresses the following objectives:

1. To analyze the structure and governance of Burkina Faso's modern poultry value chain, identifying the principal actors and their relationships.
2. To assess the determinants of competitiveness in the sector, with particular attention to dependency on imported strategic inputs.
3. To examine the implications of recent policy changes, including the October 2025 import suspension and domestic hatchery investments, for sector competitiveness.
4. To derive recommendations for strengthening value chain governance and reducing import dependency.

1.4 Significance of the Study

This study contributes to the literature on agri-food value chain governance and import substitution in West Africa. The findings have implications for policymakers, development partners, and private sector actors seeking to strengthen domestic poultry production and reduce dependence on imported inputs. The analysis of Burkina Faso's experience is particularly timely given the recent policy shift toward import substitution and the emergence of domestic hatchery capacity.

2. LITERATURE REVIEW

2.1 Value Chain Analysis and Governance Frameworks

Value chain analysis provides a framework for understanding the sequence of activities required to bring a product from production to consumption, and the relationships among actors at different stages of that sequence. The Global Value Chain (GVC) framework, developed by Gereffi, Humphrey, and Sturgeon (2005), identifies five governance types market, modular, relational, captive, and hierarchy that describe the power relationships and coordination mechanisms within value chains.

In agricultural value chains, governance structures determine how risks, costs, and benefits are distributed among actors, and how information, technology, and finance flow through the chain. Weak governance characterized by spot market transactions, limited information sharing, and absence of contractual arrangements typically results in low levels of investment, poor quality, and limited competitiveness.

2.2 The Poultry Sector in West Africa

The poultry sector in West Africa has been the subject of extensive analysis by international organizations and development agencies. The Food and Agriculture Organization (FAO) has documented the dualistic structure of poultry production in Burkina Faso, distinguishing between extensive systems (98 percent of the flock) and intensive systems (2 percent). The USAID REGIS-AG assessment provided detailed analysis of poultry value chains in Burkina Faso and Niger, identifying constraints including limited access to quality inputs, weak veterinary service coverage, and insufficient producer organisation.

The International Livestock Research Institute (ILRI) has conducted research on poultry losses and One Health issues in Burkina Faso, documenting challenges including feed unavailability, insufficient veterinary services, and producer knowledge gaps. A recent study on Newcastle disease vaccine supply chains has highlighted the importance of vaccination in reducing poultry losses.

2.3 Import Dependency and Competitiveness

The relationship between import dependency and competitiveness in agricultural value chains has been examined in the literature on food sovereignty and import substitution. Dependency on imported inputs creates vulnerabilities to exchange rate fluctuations, supply chain disruptions, and price volatility in international markets. For countries with limited foreign exchange reserves, import dependency for essential agricultural inputs can constrain sector growth and expose producers to external shocks.

The case of day-old chicks is particularly instructive. Prior to the establishment of domestic hatchery capacity, Burkina Faso's modern poultry sector was entirely dependent on imported chicks, primarily from Europe. This dependency created several

problems: high costs due to transport and intermediation; mortality during transport; delays in delivery; and vulnerability to supplier country conditions (disease outbreaks and export restrictions).

2.4 Producer Organisation and Collective Action

Producer organizations play a critical role in agricultural value chain development, providing services including input supply, technical assistance, marketing, and advocacy. In Burkina Faso, the interprofession for local poultry (IPVL/BF), created in 2011 and officially recognized in 2012, brings together producer, trader, and processor organizations for traditional poultry. However, organization among modern poultry producers has been weaker, with the Union of Intensive Poultry Operators encompassing producers across ten regions but with limited capacity for collective action.

3. RESEARCH QUESTIONS

This study is guided by the following research questions:

Research Question 1: What is the structure of Burkina Faso's modern poultry value chain, and what are the governance relationships among input suppliers, producers, and buyers?

Research Question 2: How does dependency on imported strategic inputs particularly day-old chicks and feed ingredients affect the competitiveness of the modern poultry sector?

Research Question 3: What are the implications of recent policy changes, including the October 2025 broiler chick import suspension and domestic hatchery investments, for value chain governance and competitiveness?

Research Question 4: What strategies could strengthen value chain governance and reduce import dependency to enhance sector competitiveness?

4. METHODOLOGY

4.1 Research Design

This study employs a mixed-methods approach combining value chain analysis with governance assessment. The value chain analysis maps the actors, activities, and flows within Burkina Faso's modern poultry sector. The governance assessment applies the GVC framework to characterize relationships among actors and identify leverage points for improvement.

4.2 Data Sources

The analysis draws on:

Primary secondary data sources:

- Trade data on chick imports from the International Trade Centre's Trade Map platform, as reported in recent analyses.
- Production and price data from the National Institute of Statistics and Demography (INSD).
- Value chain assessments conducted by FAO, ILRI, and USAID.
- Policy documents from the Ministry of Agriculture, Animal Resources and Fisheries.

Supplementary sources:

- Research on feed costs and input supply chains.
- Studies on producer organization and interprofession development.
- Recent reporting on hatchery investments and policy changes.

4.3 Analytical Framework

The analysis is organized around three dimensions: (1) value chain structure and flows; (2) governance relationships and coordination mechanisms; and (3) competitiveness determinants, including input costs, productivity, and market access. The framework permits assessment of how import dependency and governance weaknesses interact to constrain competitiveness.

4.4 Limitations

The analysis relies on secondary data sources that may not capture recent developments fully. The October 2025 policy change and subsequent hatchery investments are recent, and their full effects remain to be observed. Primary data collection through interviews with value chain actors was not conducted.

5. RESULTS

5.1 Value Chain Structure and Flows

Input Supply:

The modern poultry value chain in Burkina Faso is characterized by dependency on external sources for strategic inputs. Day-old chicks, until October 2025, were entirely imported. Large producers imported directly from Europe (primarily Belgium and France) or Côte d'Ivoire, while smaller producers purchased from importers or larger producers. The largest importer, CADO, based in Bobo-Dioulasso, combined importation with feed manufacturing and egg production. The state-owned PDAV also imported chicks and resold them directly or after rearing.

Feed production is dominated by a few large operators, with CADO (under the ALIMAT brand) and PDAV accounting for approximately half of the estimated 6,000–7,000 tonnes of feed produced annually. Large producers typically manufacture their own feed, while smaller producers purchase from commercial suppliers. The principal feed ingredients are maize (energy source), cottonseed cake (local protein source), and fishmeal (imported or artisanal).

Production:

The modern intensive sector comprises approximately 328 farms, concentrated around Ouagadougou, Bobo-Dioulasso, Banfora, Koudougou, Ouahigouya, Tenkodogo, and Gaoua. Flock sizes range from 200 to over 120,000 birds. These farms produce both table eggs and broiler meat, with mortality rates of 5–10 percent for chicks and 3 percent for adult birds. Production is sold to supermarkets, restaurants, hotels, and urban consumers.

Marketing and Distribution:

The marketing of modern poultry products differs from traditional systems. Eggs are sold through established relationships with supermarkets (Marina Market and Self Service), hotels (Silmandé and Indépendance), and bakeries, as well as through direct sales from farms. Broiler chickens are typically sold by weight as ready-to-cook carcasses, with prices ranging from 1,700 to 1,900 FCFA/kg. The marketing circuit depends heavily on orders from institutional buyers and events, with delivery lead times of approximately three months.

5.2 Governance Assessment

The governance of Burkina Faso's modern poultry value chain exhibits characteristics of market and modular governance types, with limited relational coordination. Transactions between producers and input suppliers are predominantly spot market, with limited contractual arrangements or long-term relationships. The absence of vertical coordination means that risks particularly price volatility for feed ingredients and exchange rate fluctuations for imported inputs are borne primarily by producers.

Producer organization is weak compared to the traditional sector. The Union of Intensive Poultry Operators encompasses producers across ten regions but lacks the institutional capacity and resources of the IPVL/BF, which benefits from development partner support. The Maison de l'Aviculture provides some coordination among egg producers but has limited reach.

The state has historically played a limited role in value chain governance, with the PDAV as a legacy state enterprise in chick importation and feed production. The October 2025 import suspension represents a significant expansion of state intervention, aimed at reshaping the competitive environment for domestic hatchery development.

5.3 Determinants of Competitiveness

Input Costs:

Feed costs constitute the largest determinant of production costs, representing approximately 80 percent of intermediate consumption. Maize prices fluctuate significantly, ranging from 80–90 FCFA/kg during harvest to 150 FCFA/kg during lean seasons. Imported feed ingredients, particularly fishmeal, are subject to exchange rate risk and international price volatility.

Day-old chick costs were a significant expense prior to the import suspension, with prices ranging from 550 to 850 FCFA per chick for layers and 550 to 625 FCFA for broilers, depending on source and volume. Transport-related mortality further increased effective costs.

Productivity:

Modern intensive operations achieve significantly higher productivity than traditional systems, with laying rates of up to 220 eggs per year and carcass weights of 2 kg at 36–42 days. However, productivity remains below potential due to feed quality variability, disease challenges, and management capacity constraints.

Market Access and Competitiveness:

The competitiveness of domestic poultry products relative to imports has been undermined by high input costs. The literature documents that distortions to international trade rules have made locally produced poultry products more expensive than imports from outside the sub-region. High costs of farm inputs, including feed, vaccines, energy, and housing, have diminished competitiveness, contributing to increased imports in recent years.

5.4 Recent Policy Changes and Hatchery Development

The October 3, 2025 suspension of broiler chick imports represents a major policy shift aimed at stimulating domestic production and reducing import dependency. The government justified the measure by citing assessments showing that domestic hatcheries could meet producer demand.

Subsequent developments have included the inauguration of new hatchery capacity. In February 2026, a US$1.2 million hatchery developed by Pharmapath Burkina was inaugurated in Tolotama, Bobo-Dioulasso, with projected production of one million hatching eggs in 2026 and two million in 2027. Other facilities, including the Couvoir Mariama at Ipelcé with announced capacity

of 10.4 million chicks per year, and the Ferme Avicole Tapsoba et Frères at Laongo producing 120,000–160,000 chicks weekly, have also been documented.

The government has committed to monitoring prices from January 2026 and to mobilizing the Fonds Dumukafa for financial support to producers. Veterinary services are expected to ensure strict quality control at hatcheries.

6. DISCUSSION OF RESULTS

6.1 The Persistence of Input Dependency

The analysis reveals that despite decades of recognition of the sector's potential, Burkina Faso's modern poultry sector remained structurally dependent on imported strategic inputs until the recent policy shift. This dependency reflects several factors: the technical requirements for hatchery operation (parent stock, incubation equipment, and biosecurity); the capital intensity of hatchery investment; and the political economy of import trade, which generated rents for importers and provided revenue for the state through customs duties.

The persistence of dependency despite its costs higher input prices, transport mortality, and supply disruptions suggests that the constraints were not merely technical or economic but also institutional and political. The absence of domestic hatchery investment reflected risk perceptions, capital constraints, and the absence of enabling policies. The October 2025 import suspension changed the incentive environment fundamentally.

6.2 Governance Weaknesses and Their Consequences

The governance weaknesses documented in this analysis fragmented producer organization, limited vertical coordination, and absence of contractual arrangements have constrained the sector's capacity to respond to competitive pressures. Weak governance means that individual producers bear the full burden of input price volatility and exchange rate risk, with limited capacity to negotiate better terms or to invest in productivity improvements.

The contrast with the traditional sector is instructive. The IPVL/BF, supported by the PAFASP programme, has provided services to traditional poultry producers including technical training, networking for export, and advocacy. The Ferme Kouna, a member of IPVL/BF, has benefited from these services and has grown to 22,000 laying hens producing nearly 3 million eggs annually. The modern sector lacks an equivalent organisation with comparable capacity.

6.3 The Policy Shift and Its Implications

The October 2025 import suspension represents a significant policy intervention that has already stimulated domestic hatchery investment. However, the sustainability of this import substitution strategy depends on several factors. First, domestic hatcheries must achieve competitive production costs and reliable quality to avoid price increases or supply disruptions for producers. Second, the policy must be maintained consistently to provide the certainty needed for continued investment. Third, complementary measures addressing feed input dependency, strengthening veterinary services, and improving access to finance are necessary to ensure that chick import substitution translates into sector-wide competitiveness improvements.

The announced price monitoring from January 2026 and the mobilization of the Fonds Dumukafa suggest that the government recognizes the need for complementary measures. However, the effectiveness of these measures remains to be demonstrated.

6.4 Implications for Value Chain Governance

The findings suggest that strengthening value chain governance is essential for sustained competitiveness improvement. This requires action at multiple levels: at the producer level, strengthening organisation to enable collective input purchasing, shared services, and advocacy; at the inter-professional level, creating mechanisms for coordination among input suppliers, producers, and buyers; and at the policy level, creating an enabling environment through consistent policy, appropriate regulation, and targeted support.

The experience of the IPVL/BF in the traditional sector provides a model that could be adapted for the modern sector, though the different characteristics of modern producers larger scale, more commercial orientation, and greater capital requirements would require adaptation.

6.5 Contribution to Knowledge

This study contributes to the literature on agri-food value chain governance and import substitution by documenting the structural determinants of competitiveness in Burkina Faso's modern poultry sector. The analysis demonstrates that import dependency for strategic inputs is not simply a technical constraint but reflects deeper governance weaknesses and political economy dynamics. The findings suggest that import substitution policies, while necessary, are insufficient without complementary measures to strengthen value chain governance and address input cost structures.

7. CONCLUSION

This study has examined the determinants of competitiveness in Burkina Faso's modern poultry sector, focusing on import dependency on strategic inputs and value chain governance. The analysis reveals that dependence on imported day-old chicks and

feed ingredients has constituted a fundamental constraint on sector competitiveness, contributing to high production costs and vulnerability to external shocks.

The governance of the value chain is characterized by weak vertical coordination, fragmented producer organization, and limited contractual arrangements. These governance weaknesses have constrained the sector's capacity to respond to competitive pressures and to capture value from growing domestic demand.

The October 2025 suspension of broiler chick imports and the subsequent inauguration of domestic hatchery capacity represent a significant policy shift that may reshape competitive dynamics. However, the sustainability of this import substitution strategy depends on complementary measures to address feed input dependency, strengthen producer organisation, and improve access to finance.

The policy implications are clear. First, consistent policy implementation is essential to provide the certainty needed for continued private investment in hatchery capacity. Second, addressing feed input dependency requires investment in domestic feed production, including maize and protein sources, and measures to reduce price volatility. Third, strengthening producer organization through adapted models of inter-professional coordination is necessary for collective action and advocacy. Fourth, improving access to finance for both hatchery investment and working capital for producers is essential for sector growth.

8. LIMITS OF THE STUDY

This study has several limitations that should be acknowledged.

First, the analysis relies primarily on secondary data sources and does not include primary data collection through interviews with value chain actors. Such data would provide richer understanding of governance relationships and producer perspectives.

Second, the October 2025 policy change and subsequent hatchery investments are recent developments whose full effects remain to be observed. The analysis of their implications is necessarily provisional.

Third, the study focuses on the modern poultry sector and does not systematically examine interactions with the traditional sector. The relationship between modern and traditional production systems merits further analysis.

Fourth, the analysis of competitiveness is constrained by data limitations, particularly regarding production costs, profit margins, and import competition. More detailed cost-of-production analysis would strengthen the evidence base.

Fifth, the study does not include quantitative analysis of the determinants of competitiveness, such as regression analysis of factors affecting production efficiency or market share. Such analysis could be a valuable extension of this work.

9. ACKNOWLEDGMENTS

The author acknowledges the use of publicly available data and reports from the FAO, ILRI, USAID, the Government of Burkina Faso, and other sources. The views expressed are those of the author alone.

10. AUTHOR CONTRIBUTIONS

The author confirms sole responsibility for the study conception, design, data analysis, interpretation, and manuscript preparation.

11. COMPETING INTEREST

The author declares no competing interests.

12. FUNDING INFORMATION

This research received no specific grant from any funding agency in the public, commercial, or not-for-profit sectors.

13. DATA AVAILABILITY

The data supporting this study are derived from publicly available sources including FAO reports, ILRI publications, USAID assessments, and government policy documents. Specific sources are identified in the Bibliography.

14. DISCLAIMER

The views and opinions expressed in this article are those of the author and do not necessarily reflect the official policy or position of any institution. The analysis is based on publicly available information as of the date of writing..

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