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Report Highlights:

FAS Pretoria forecasts a two percent increase in chicken meat production, reaching 1.68 million tons in Marketing Year (MY) 2026 (January to December 2026). This growth is driven by lower feed prices following the recovery of the local grains harvest in MY 2025/2026. FAS Pretoria estimates a four percent rise in chicken meat production for MY 2025, reflecting full recovery from the Highly Pathogenic Avian Influenza outbreak that severely impacted the industry in 2023. FAS Pretoria forecasts that chicken meat consumption will increase marginally to 1.92 million tons in 2026, driven by higher supplies that are expected to ease prices. FAS Pretoria forecasts that South Africa's poultry imports will decrease by five percent to 308,000 tons in 2026, driven by protectionist policies including anti-dumping duties and high tariffs that limit the competitiveness and market access of imported poultry.

Executive Summary

Production: Chicken meat production is forecast to grow by 2 percent in 2026, reaching 1.68 million tons, driven by lower feed costs and industry recovery from Highly Pathogenic Avian Influenza (HPAI). Investments of R2.1 billion between 2019 and 2023 have expanded production facilities.

Consumption: Chicken remains the most affordable protein source, accounting for 60 percent of total meat consumption. Consumption is forecasted to rise marginally to 1.92 million tons in 2026, despite economic pressure leading consumers to favor cheaper products like offal and Mechanically Deboned Meat (MDM).

Imports: Poultry imports are expected to decrease by 5 percent to 308,000 tons in 2026 as the South African poultry industries seeks to limit competition through high tariffs, anti-dumping duties, and HPAI-related restrictions. MDM imports dominated, accounting for 53 percent of total poultry imports in the first half of 2025.

Exports: Exports are forecast to increase by 5 percent to 65,000 tons in 2026, driven by the competitive pricing of South Africa poultry in key export markets and diversification efforts. Southern African Customs Union (SACU) countries remain the primary export destinations.

Table 1

Chicken Meat Production, Supply and Distribution Table

Meat, Chicken Market Year Begins	2024		2025		2026	
	Jan 2024		Jan 2025		Jan 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
South Africa						
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	1590	1579	1645	1647	0	1680
Total Imports (1000 MT)	347	347	325	325	0	308
Total Supply (1000 MT)	1937	1926	1970	1972	0	1988
Total Exports (1000 MT)	58	60	60	62	0	65
Human Consumption (1000 MT)	1879	1866	1910	1910	0	1923
Other Use, Losses (1000 MT)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT)	1879	1866	1910	1910	0	1923
Total Use (1000 MT)	1937	1926	1970	1972	0	1988
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	1937	1926	1970	1972	0	1988

Note: All data in 1000 MT

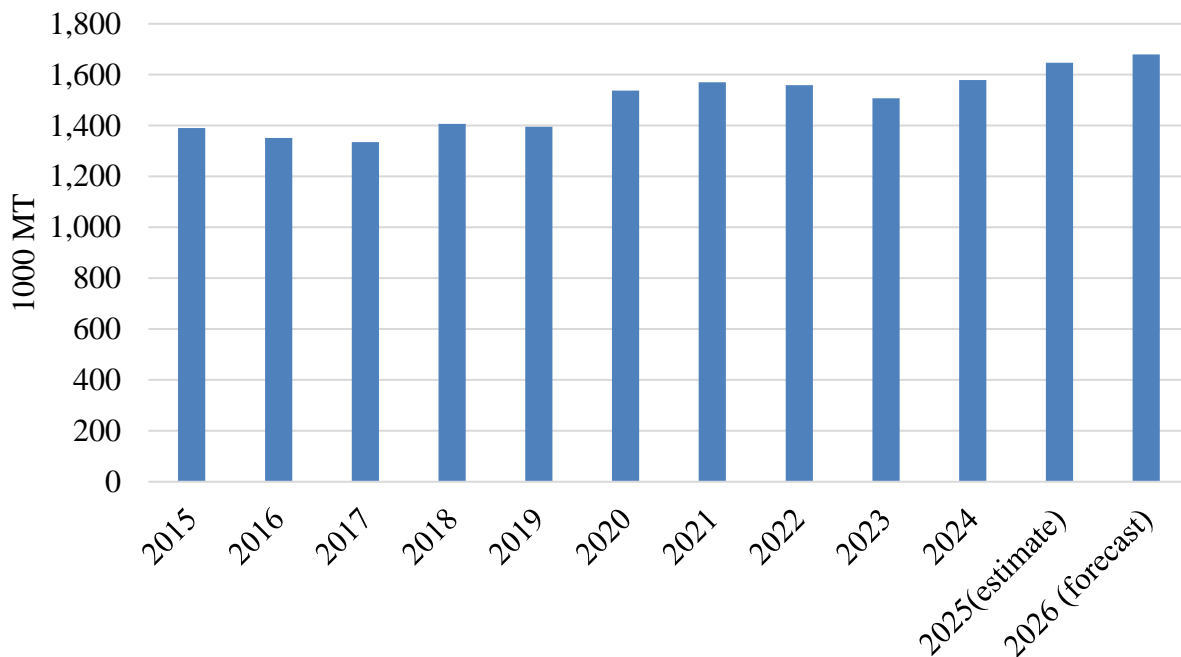
Production

FAS Pretoria forecasts a two percent increase in chicken meat production, reaching 1.68 million tons in Marketing Year (MY) 2026 (January to December 2026). This growth is driven by expansion in the domestic industry, supported by lower feed prices following the recovery of the local grains harvest in MY 2025/2026.

FAS Pretoria estimates a four percent rise in chicken meat production for MY 2025, reflecting full recovery from the Highly Pathogenic Avian Influenza outbreak that severely impacted the industry in 2023.

Figure 1

South Africa's Chicken Meat Production



Source: *Post Estimate and Forecast and USDA Production Supply & Distribution*

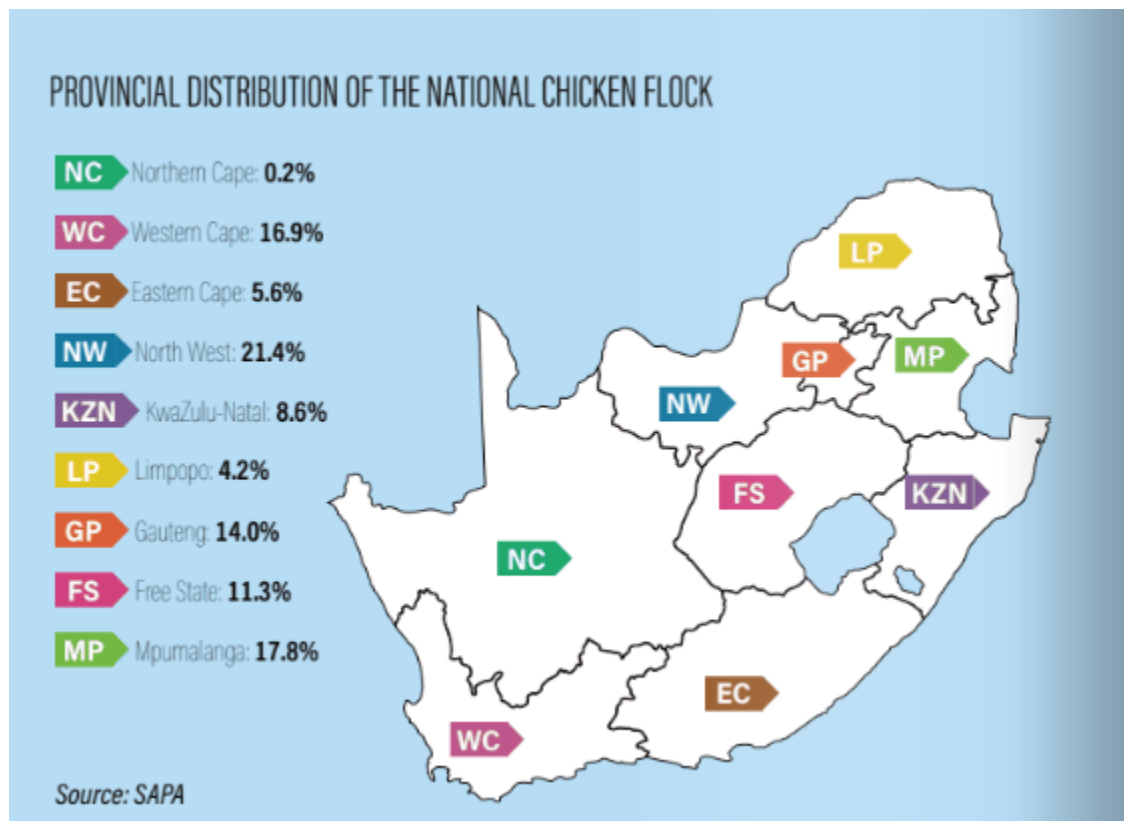
Note: *Includes commercial broiler production as well as subsistence sector and spent hens but excludes offal. All figures are USDA Official with the exception of the estimate and forecast.*

The South African Poultry Association (SAPA) reported that, between 2019 and 2023, the industry had invested R2.1 billion to build and expand production facilities. This investment led to the establishment of 20 new contract growers, adding 19 million broilers to annual national production and creating 1,638 jobs. The poultry industry now accounts for 15 percent of total agricultural production, with a gross value of R65.77 billion.

SAPA further noted that the industry has recovered from the Highly Pathogenic Avian Influenza (HPAI) outbreak that nearly decimated production in 2023. Weekly production improved from 19 million birds per week in 2023 to 22.6 million birds per week by July 2024.

Figure 2

Provincial Distribution of the National Chicken Flock



Source: *South African Poultry Association (SAPA)*

South Africa produces poultry across all nine provinces, with 82 percent of the flock consisting of broilers. The Northwest province leads in chicken production, contributing 21.4 percent, followed by Mpumalanga at 17.8 percent and Western Cape at 16.9 percent. As of July 2023, the South African Poultry Association (SAPA) reported 973 poultry farms nationwide, including 684 large commercial farms. SAPA defines large farms as having capacity to produce over 40,000 birds in the broiler industry and more than 50,000 birds in the egg industry. In South Africa, 48 farms house more than 500,000 birds (primarily or exclusively broilers), and 17 farms have over 700,000 birds each.

Genetics

The day-old chick industry supplies critical inputs to both the egg and broiler sectors. Pure genetic lines are imported at the great-grandparent, grandparent, or parent level, with most imports occurring at the grandparent level. Commercial day-old chicks and fertile eggs are not imported. Historically, the South African broiler industry relied on three breeds: Ross 308, Cobb 500, and Arbor Acres. However, the

Indian River breed, introduced in 2021, fully replaced the Cobb breed by 2023. The Indian River breed is known for its strong performance, excellent feed conversion ratio, and high meat yield, especially of leg meat.

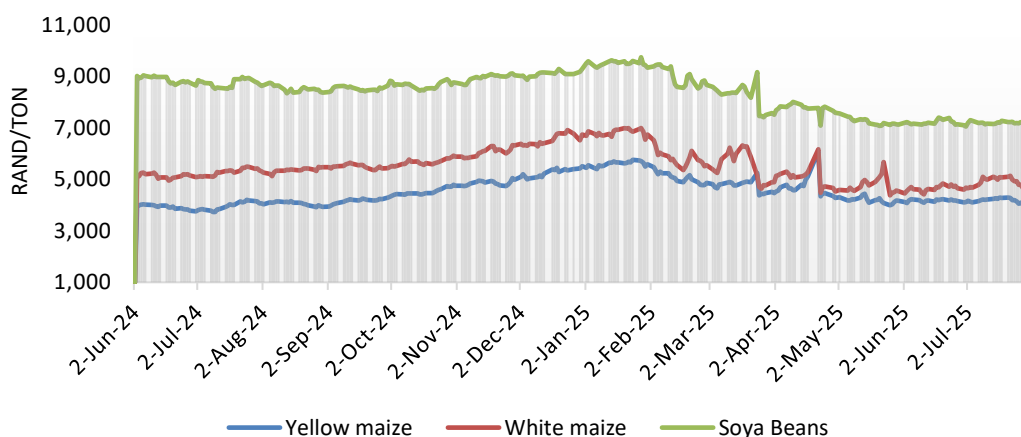
The international genetics companies for each of these breeds have granted the distribution rights to the parent stock to only three companies in South Africa. These three companies supply parent stock to integrated and non-integrated broiler breeder operations, where the parent birds are reared until they are ready to start producing fertilized eggs. The eggs are transferred to hatcheries, where they are hatched into day-old broiler chicks. The chicks are either sold to independent broiler growers or used internally by fully integrated companies. The industry operates nationwide, with higher concentrations of producers in Gauteng, the Western Cape, KwaZulu-Natal, and Northwest regions.

Feed

The Office of Agricultural Affairs in Pretoria forecasts that South Africa’s corn planting area for Marketing Year (MY) 2025/26 will remain stable at three million hectares (Mha). The MY 2024/25 (May 2025–April 2026) corn harvest is projected to increase to 15 million metric tons (MMT), driven by declining global corn prices and a stronger local currency. By the end of June 2025, local prices for white corn, yellow corn, and soybeans had decreased by 30 percent, 24 percent, and 25 percent, respectively, compared to the beginning of the year. This drop reflects the industry’s recovery from the previous year’s drought, which led to increased imports and higher feed costs.

Figure 3

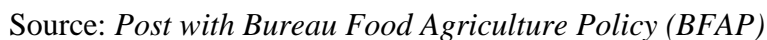
Soybean, White and Yellow Maize Daily Prices



Source: FAS/Pretoria with Grain SA Data

The broiler industry in South Africa consumes approximately four million tons of feed annually, primarily produced domestically by integrated companies. Feed costs account for 70 percent of overall broiler production expenses. A typical feed mix consists of 50 percent yellow maize, 20–30 percent soy, and 20–30 percent other ingredients. According to the Bureau of Food and Agricultural Policy (BFAP), the industry has improved technical efficiency, achieving a feed conversion rate of 1.45.

The South African Poultry Value Chain



Two major producers, Rainbow (formerly a part of RCL Foods) and Astral Foods, dominate the market, collectively accounting for approximately 50 percent of broiler production. In March 2025, Rainbow Chicken reported a 14-fold increase in half-year profits as the company recovered from the 2023 bird flu outbreak. In contrast, Astral Foods experienced a 49 percent decline in profits during the same period.

On June 21, 2025, new HPAI cases were reported on farms in the Northwest and Mpumalanga provinces. The World Animal Health Information System (WAHIS) recorded approximately 1,500 bird deaths and 100,000 birds deemed susceptible. On August 2, 2025, another highly pathogenic influenza outbreak was reported in the Western Cape Province. These are the first outbreaks since September 2023, which was described as the worst in South Africa's history.

Following the 2023 outbreak, the poultry industry advocated for herd vaccination, prompting the Department of Agriculture to introduce protocols for the H5N1 vaccination strain. On June 5, 2025, the

Minister of Agriculture announced an urgent, coordinated vaccination roll-out plan based on the following principles:

- Vaccinations will be administered to day-old chicks destined for breeder operations and layer farms producing table eggs. Broilers raised for meat will not be vaccinated.
- Producers must maintain separate flocks of unvaccinated chickens for export markets, as several countries do not accept meat from vaccinated flocks.
- Vaccinations will use three approved vaccines to protect against the H5 strain of the virus.

However, no vaccinations have occurred yet, as producers found the regulations too costly and burdensome to implement. Astral Foods, one of South Africa's largest poultry producers, is the only company so far to attempt to comply with the vaccination requirements. On June 30, Astral announced plans to vaccinate its first broiler-breeder flock once vaccine supply delays are resolved. The initial permit applies to a farm where 200,000 broiler breeder hens will be vaccinated. Astral intends to then expand the program to other breeder facilities nationwide.

Historically, the South African government has not compensated producers for culling chickens during HPAI outbreaks. However, in June 2024, the Western Cape High Court rejected the government's zero-compensation policy after a poultry farmer challenged the Department of Agriculture over losses from the 2021 outbreak. The court ruled that the matter must be reconsidered by the Department, potentially opening the door for claims related to outbreaks in 2017, 2021, and 2023. If compensation is granted, the industry could gain additional funds for expansion and upgrades. The Department of Agriculture has appealed the High Court's decision, and SAPA has announced its intention to join the producer in the legal challenge.

Consumption

FAS Pretoria forecasts that chicken meat consumption will increase marginally to 1.92 million tons in 2026, driven by higher supplies that are expected to ease prices. For 2025, consumption is estimated to rise by two percent to 1.91 million tons, as poultry remains the most affordable protein source in South Africa. Despite a decline in per capita consumption over the past four years, chicken meat continues to account for 60 percent of total meat consumption in the country.

Poultry remains more affordable than other meat products. On August 1, 2025, Individual Quick Frozen (IQF) chicken portions cost R35.38 per kilogram, compared to R57.50 per kilogram for class C2/3 beef and R74.75 per kilogram for class C2/3 lamb. The C2/3 classification refers to affordable cuts from older animals, making them a lower-cost option for consumers.

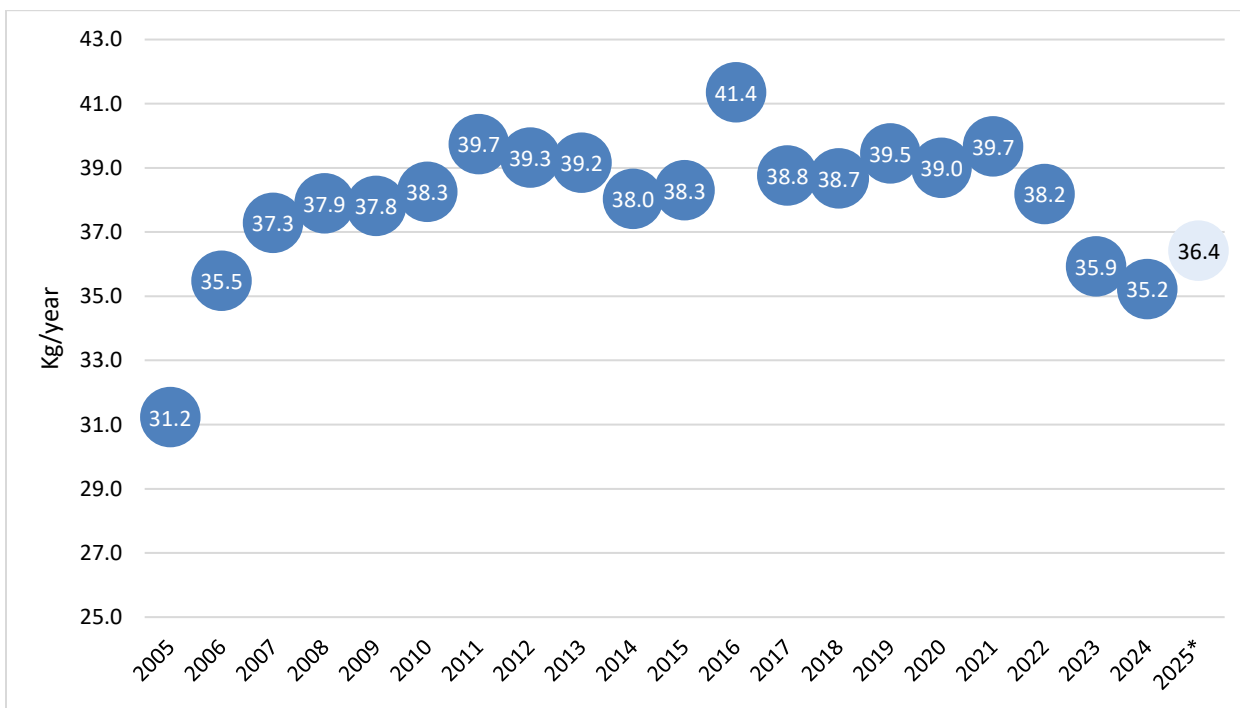


Mechanically Deboned Meat (MDM) is the cheapest poultry option, used in processed products. Polonies (similar to U.S. baloney) and other MDM-based products are mostly consumed by cash-strapped consumers.

Source: SAPA

Figure 5

South Africa's per Capita Consumption of Chicken Meat (Kilogram per Year)



Source: Post using South Africa's Department of Agriculture data (not official USDA statistics)

Per Capita Consumption and Market Trends

South Africa's per capita chicken meat consumption increased by one percent over the past 20 years but declined by eight percent between 2021 and 2024. Rising living costs and poor economic growth have pressured household incomes, leading consumers to opt for cheaper chicken cuts, such as offal, to meet their protein needs. While Individual Quick Frozen (IQF) portions remain the preferred chicken product, offal and cold meats made from MDM have overtaken IQFs in market share due to their affordability.

According to the Bureau of Food and Agricultural Policy (BFAP), IQF chicken prices rose by 2.2 percent month-on-month and 13.9 percent year-on-year in June 2025. This price increase reflects weaker domestic supply caused by import restrictions on Brazilian chicken due to HPAI outbreaks in Brazil. HPAI restrictions along with high duties are meant to shield the South Africa poultry industry from competition but have contributed to higher prices for consumers, particularly for poorer consumers that rely on poultry.

Wholesalers in the chicken market emphasize that offal plays a critical role in the local poultry value chain. Selling offal supports cost recovery, which helps reduce the price of prime chicken portions and benefits consumers.

VAT Exemption Efforts

The South African Poultry Association (SAPA) requested that IQF portions be added to the Value Added Tax (VAT) exemption list when the President announced plans to expand the list of exempted products. However, only chicken offal was included. SAPA continues to advocate for IQF portions to be added to the exemption list and has prioritized this effort in phase two of the poultry industry master plan.

Imports

FAS Pretoria forecasts that South Africa's poultry imports will decrease by five percent to 308,000 tons in 2026, driven by anti-dumping duties and high tariffs that limit the competitiveness and market access of imported poultry. For 2025, imports are estimated to drop by six percent to 325,000 tons due to HPAI-related import restrictions on Brazil during the first half of the year, combined with existing tariffs. The South African poultry industry boasts as being highly efficient and competitive on one hand and on the other insists it must be protected from imported product, which would lower prices for consumers. The South African poultry industry has a strong lobby which spreads false and misleading information about imported poultry products.

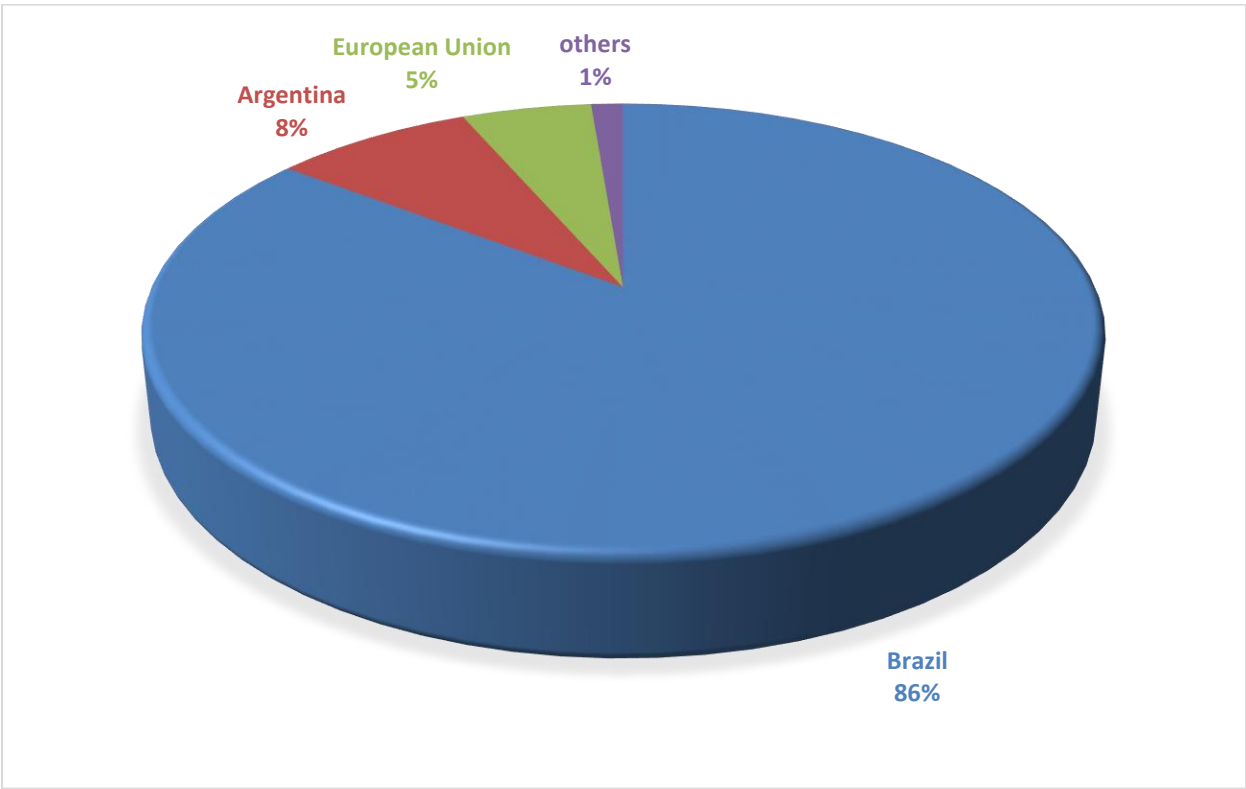
Imports have struggled in the South African market due to high tariffs and trade restrictions. Total imports for the first half of 2025 (January–June) decreased by 23 percent compared to the same period in 2024. However, volumes are expected to improve marginally in the second half of the year following the lifting of Brazil's HPAI restrictions.

South Africa has seen a shift in import patterns, with tariffs and duties on bone-in chicken and full carcass chicken driving increased imports of mechanically deboned meat (MDM) and offal. Over the past five years, offal imports have grown by 11 percent, and MDM imports have increased by five percent.

MDM is primarily imported from Brazil and enters South Africa tariff-free. In 2019, prior to tariff increases, MDM accounted for 37 percent of total poultry meat imports. By 2024, MDM represented 63 percent of poultry imports, though its share declined slightly to 53 percent during the first half of 2025. South Africa does not produce significant quantities of MDM because local producers prefer to sell the offcuts. Carcasses that would end up as MDM are sold as soup packs. Secondly the local industry reports that it would almost be impossible to compete with the extremely low prices at which MDM is imported. However, import restrictions and high duties mean that MDM prices for low-income consumers are much higher than they would be without trade restrictions. The United States does not have market access for this product.

Figure 6

Origin of Chicken Meat Imported into South Africa for January-June 2025



Source: *Post* using Trade Data Monitoring (TDM) data

Table 2

South Africa’s Chicken Meat Imports in Tons

Partner	2022	2023	2024	Jan- June 2024*	Jan-June 2025*	%Δ
Brazil	235,471	274,897	280,412	143,786	125,157	-13%
Argentina	33,376	17,238	12,154	15,156	10,478	-31%
European Union	1,363	8,023	25,615	9,324	6,413	-31%
United States	45,935	38,633	23,551	9,587	351	-96%
Others	4,418	66,987	5,013	35,996	2,035	-94%
Total	320,563	341,884	346,745	179,782	135,110	-25%

Source: Post using TDM data

*Year to date: January – June

Tariffs

High tariffs continue to suppress poultry meat imports from major suppliers and raise prices for South African consumers. On March 12, 2020, South Africa increased its applied Most Favored Nation (MFN) duties on poultry imports. The duty on bone-in chicken rose from 37 percent to 62 percent, while the duty on boneless portions increased from 12 percent to 42 percent. These tariff rates remain within South Africa’s World Trade Organization (WTO) bound commitments.

Table 3

South Africa’s Import Tariffs for Specific Chicken Meat Products

Tariff Heading	Product Description	Rate of Duty				
		General	EU	EFTA*	SADC**	MERCOSUR
0207.12.10	Mechanically Deboned meat	Free	Free	Free	Free	Free
0207.12.20	Carcasses (excluding necks and offal with all cuts removed), Frozen	31%	Free	31%	Free	31%

0207.12.90	Frozen Whole Birds	82%	Free	82%	Free	82%
0207.14.10	Boneless cuts	42%	Free	42%	Free	42%
0207.14.20	Offal	30%	Free	30%	Free	30%
0207.14.90	Bone-in cuts	62%	Free	62%	Free	62%

Source: Post using South African Revenue Services rates

*EFTA = European Free Trade Association

**SADC = Southern African Development Community

Currently, South Africa is applying anti-dumping duties (ADDs) to poultry imports from all major suppliers, except Argentina. South Africa first applied the ADDs in 2000 on U.S. poultry and in 2015 on EU poultry.

Table 4

Current Maximum Anti-Dumping Duties for Bone-in Poultry

Country	Current tariffs
Brazil	265.10%
Denmark	67.40%
Ireland	37.52%
Poland	96.90%
Spain	85.80%
Germany	73.33%
Netherlands	22.81%
United Kingdom	30.99%
United States	9,40 per kilogram

Source: Post using ITAC and South African Department of Treasury

Note: Specific Suppliers may have lesser ADDs applied based on participation in ADD review

Anti-Dumping Duties and the U.S. Tariff Rate Quota (TRQ)

Exports of frozen bone-in chicken portions from the United States to South Africa have been subject to anti-dumping duties since 2000. These duties are reviewed every five years by the International Trade Administration Commission (ITAC). On April 17, 2024, ITAC announced in the government gazette that the anti-dumping duties would be extended at current levels, following the Minister's concurrence with ITAC's recommendation (see: [South Africa extends anti-dumping duties on US bone-in poultry at current levels](#)).

In 2016, after extensive negotiations, the U.S. and South African poultry industries agreed to a Tariff Rate Quota (TRQ) that exempts a set volume of U.S. frozen bone-in portions from anti-dumping duties. However, even U.S. exports of leg quarters within the TRQ still face the 62 percent MFN duty. The TRQ applies only to exports to South Africa and excludes Botswana, Lesotho, Namibia, and Eswatini,

which are part of the Southern African Customs Union. The four SACU countries are excluded from the TRQ agreement.

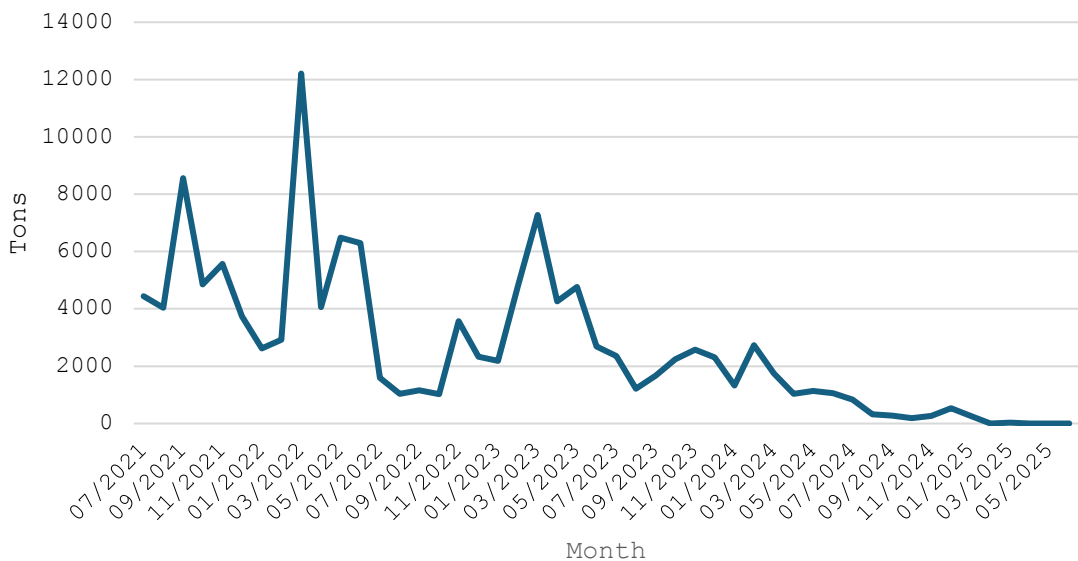
Since the 2020/21 quota year, the TRQ has not been fully utilized due to the high in-quota rate, structural challenges, and unfavorable market conditions. For the 2024/25 quota year, utilization fell to eight percent—the lowest since the TRQ’s inception—due to prolonged unscientific restrictions on exports from 27 U.S. states affected by HPAI. The quota for 2025/26 (April–March) remains unchanged at 71,963 tons.

Industry Opposition to the TRQ

The South African Poultry Association (SAPA) has formally requested the removal of the TRQ, arguing that it was “forced” on South Africa as a condition for retaining trade benefits under the African Growth and Opportunity Act (AGOA). SAPA contends that the TRQ is unjustified, particularly after the United States implemented first 10 percent then 30 percent tariffs on South African steel, cars, fruits, and nuts. The association asserts that these U.S. tariffs undermine the rationale for maintaining the chicken quota. The current 62 percent duty on U.S. chicken leg quarters is not sufficient for SAPA and even greater protection from free trade is needed. The government of South Africa is faced with balancing SAPA’s never ending demand for even greater protection from competition with the need to have affordable chicken prices for low-income consumers.

Figure 7

U.S. Bone-in Chicken Exports to South Africa - July 2021 to June 2025



Source: *Post using TDM, LLC*

HPAI Restrictions

In addition to explicit measures restricting poultry imports, South Africa imposes limitations on poultry exports from countries affected by Highly Pathogenic Avian Influenza (HPAI) outbreaks. Currently, South Africa restricts poultry imports from France, Poland, Hungary, Canada, Germany, Israel, New Zealand, Sweden, Spain, United Kingdom, Zimbabwe and several U.S. states due to HPAI incidents. Restrictions on several European Union countries were lifted in 2024 which led to a 219 percent increase in South Africa's poultry imports from the European Union.

On May 16, 2025, Brazil reported an HPAI outbreak in the state of Rio Grande do Sul. South Africa responded by restricting poultry imports from the entire country, citing Brazil's lack of a compartmentalization agreement. This decision drew criticism from the South African Meat Processing Industry, as Brazil is South Africa's primary supplier of Mechanically Deboned Meat (MDM). On June 19, 2025, South Africa partially lifted the restrictions after receiving a second report from Brazil's Ministry of Agriculture confirming containment of the outbreak to a single state. By July 4, 2025, South Africa fully lifted the restrictions on poultry imports from Brazil.

The United States has faced significant losses in market share due to HPAI-related restrictions, despite a bilateral protocol designed to facilitate the quick resumption of trade following disease containment. The protocol allowed for lifting of restrictions after 90 days and receipt of survey information from the United States Department of Agriculture (USDA). Because of significant processing delays in the earlier protocol, the South African Department of Agriculture committed to a yearlong arrangement in March 2025 with USDA, under which USDA is authorized to self-restrict and self-restart poultry exports whenever it deals with HPAI outbreaks. The arrangement allows U.S. officials to manage trade restrictions by state, halting exports from affected states until outbreaks have been cleared for 90 days. The arrangement is not unique to South Africa and applies to most countries that import U.S. poultry.

The South African Poultry Association (SAPA) has expressed dissatisfaction with the agreement, arguing that the government failed to consult industry stakeholders and created a potential conflict of interest. SAPA has mischaracterized the agreement in the press.

Exports

FAS Pretoria forecasts that South Africa's chicken meat exports will increase by five percent to 65,000 tons in Marketing Year (MY) 2026, driven by the affordability of poultry in key export markets. South Africa primarily exports to the Southern Africa region, where cost-conscious consumers tend to favor poultry over red meat. Southern African Customs Union (SACU) countries rely heavily on tariff-free South African poultry imports, as other trading partners are subject to the same tariffs and anti-dumping duties imposed in South Africa.

Phase 2 of the Poultry Value Chain Masterplan

The Department of Trade, Industry, and Competition, along with the Department of Agriculture, launched Phase 2 of the South African Poultry Value Chain Masterplan. The plan aims to drive growth through exports, particularly in cooked poultry, while increasing local demand through effective trade measures and biosecurity improvements. According to the South African Poultry Association (SAPA), Phase 2 emphasizes leveraging national export ecosystems, including special economic zones (SEZs), government funding, and private sector investments, to enhance competitiveness and compliance with

market requirements. These efforts aim to improve South Africa’s global market access potential. To expand international markets, SAPA’s export industry working group hosted the UK’s Department for Environment, Food and Rural Affairs (DEFRA) in May 2025. DEFRA conducted an audit of South Africa’s export readiness, a critical step toward securing access to the UK market for processed and heat-treated poultry products. The working group is also pursuing access to other high-value markets, including Saudi Arabia and the European Union.

FAS Pretoria estimates that South Africa’s chicken meat exports will increase to 62,000 tons in 2025. This growth is attributed to increased production following the recovery of feed production and prices, as well as diversification of export markets. Countries such as the United Arab Emirates have demonstrated rising demand for South African poultry.

Table 5

South Africa’s Chicken Meat Exports in tons

Partner	2022	2023	2024	Jan- June 2024*	Jan-June 2025*	%Δ
Lesotho	25,361	21,166	21,554	10,136	8,599	-15%
Mozambique	14,111	11,005	12258	6,379	5,280	-17%
Namibia	9,017	10,446	11,491	5,936	3,118	-47%
Botswana	2,673	3,070	6,260	2,986	1,581	-47%
Eswatini	3,248	3,948	4,908	2,254	2,124	-6%
United Arab Emirates	761	481	1,665	567	821	45%
Others	2,687	6,774	4,723	2,856	3,952	38%
Total	57,858	56,890	62,859	31,114	24,266	-22%

Source: *Post using Trade Data Monitor, LLC*

*Year to date: January- June

Attachments:

No Attachments