



SOUTH AFRICAN POULTRY PRODUCTS PRICE MONITOR

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EXECUTIVE SUMMARY:

- According to data provided by the Food and Agriculture Organization (FAO) of the United Nations, the average international poultry meat price index in the first quarter of 2025 stood at 115.9 points, marking a 7.5% increase compared to the 107.8 points recorded in the first quarter of 2024.
- During the first quarter (Q1) of 2025: On a year-on-year comparison, data from the South African Revenue Service (SARS) show that South Africa imported a total of 87 375 tons of chicken meat in Q1: 2025, indicating a 11.2% decrease from the 98 358 tons imported in Q1: 2024. The main contributors to the observed increase in chicken meat imports during Q1 were value-added processed (357.1%), followed by “Other” (51.2%), frozen chicken feet increased by 30.1%, and mechanical deboned meat (MDM) (1.3%).
- When comparing the first quarters (January-March) of 2025 and 2024, producer prices for frozen chicken and fresh chicken decreased by 7.18% and 1.74%, respectively, while prices for IQF increased by 1.22%. Comparing the first quarter of 2025 with the fourth quarter of 2024, producer prices for frozen chicken decreased by 0.48% while fresh chicken and IQF chicken increased by 5.03% and 4.46%, respectively. Numerous factors have contributed to the recent trends in producer prices. Many factors, such as increasing availability, decreased import prices, lower input costs, and shifting customer tastes, contribute to the decline in poultry producer prices in South Africa.
- When comparing retail prices per kilogram (kg) for the first quarter of 2025 to the first quarter of 2024, prices for chicken giblets, whole chicken and fresh chicken portions decreased by 3.01, 3.42% and 0.73%, respectively, while portions for frozen non-IQF and IQF chicken portions increased by 3.85% and 3.20% respectively.
- During the first quarter of 2025, the average spot price for a ton of yellow maize was R5 153, indicating a 31.90% increase compared to the corresponding period (Q1) in 2024, and was 6.36% higher than the fourth quarter of 2024. On the other hand, sunflower seed prices increased to R9 460 per ton during quarter 1 of 2025, reflecting a 9.61% increase compared to the same period the previous year, but down 6.76% in quarter 1 of 2025 when compared to the preceding quarter (Q4: 2024). For soybean, the average spot price stood at R9 070 in the first quarter of 2025, representing an 8.60% increase and 2.34% increase when compared to the first quarter of 2024 and the fourth quarter of 2024, respectively.

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1. Introduction

Most of South Africa's population obtains affordable animal protein from poultry, making it crucial for maintaining and improving the country's food security. This report tracks the cost of different chicken meat products in South Africa and compares them to current global poultry market trends. The former Department of Agriculture, Forestry and Fisheries (DAFF), currently known as the Department of Agriculture (DoA), established the Food Price Monitoring Committee (FPMC) which was mandated by the National Agricultural Marketing Council (NAMC) to track and report on food price trends. International poultry meat prices, imports of chicken products into South Africa, producer pricing, and retail poultry prices are examined every three months. To provide a more comprehensive comparison between domestic poultry prices and global market prices, the analysis also includes feed prices.

2. International poultry meat price index

Figure 1 presents the global poultry meat price index trends from the first quarter of 2014 (January – March) to the first quarter of 2025 (January - March), with 2014-2016 used as the base years. According to data provided by the Food and Agriculture Organization (FAO), the average international poultry meat price index in the first quarter of 2025 stood at 115.9 points, marking a 7.5% increase compared to the 107.84 points recorded in the fourth quarter of 2024. When comparing the first quarter of 2025 to the fourth quarter of 2024, the index decreased slightly by 3.5% from 122.79 points to 120.84 points as already mentioned. Lower quotations in Brazil, where the discovery of highly pathogenic avian influenza on a commercial farm in mid-May prompted import bans by several major importing countries, contributed to the decline in international poultry prices in May 2025. This resulted in an abundance of surplus supplies and downward pressure on prices.

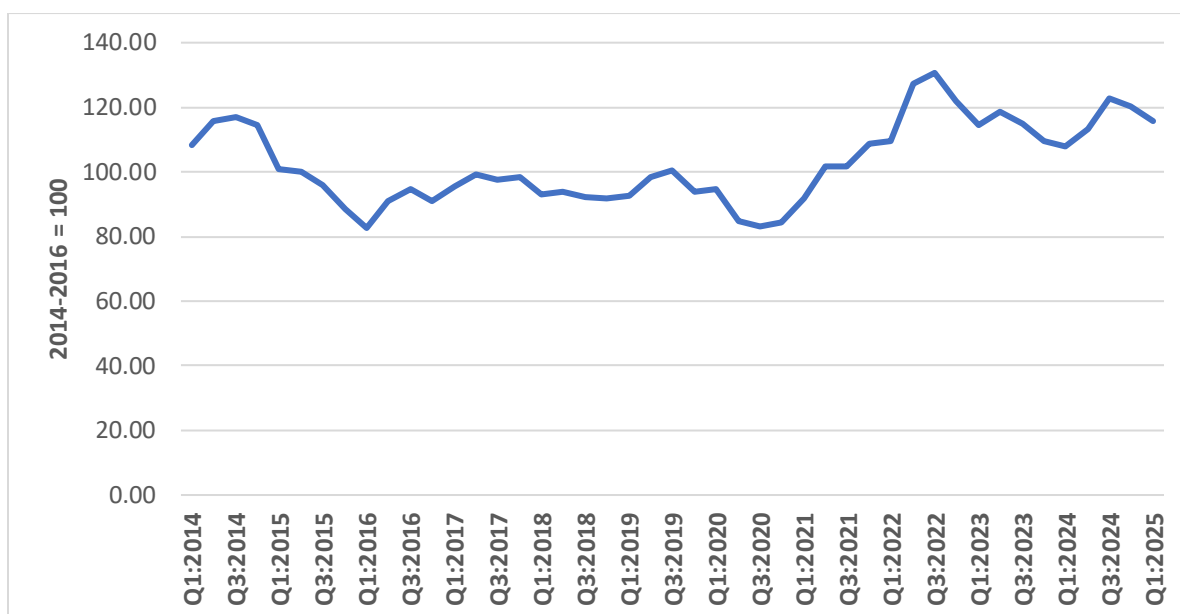


Figure 1: International Poultry Meat Real Price Index (IPMRPI)

Source: FAO, 2025

3. Chicken meat imports

This section compares the volume of chicken meat (in tons) imported into South Africa between quarter 1 (January-March) of 2025 (Q1:2025) and quarter 1 of 2024 (Q1:2024), as well as quarter 1 (January-March) of 2025 versus quarter 4 (October-December) of 2024. On a year-on-year comparison, data from the South African Revenue Service (SARS) show that South Africa imported a total of 87 375 tons of chicken meat in Q1: 2025, indicating a 11.2% decrease from the 98 358 tons imported in Q1: 2024. The main contributors to the observed increase in chicken meat imports during Q1 were value-added processed (357.1%), followed by “Other” (51.2%), frozen chicken feet increased by 38.930.1%, followed by other (51.2%), and mechanical deboned meat (MDM) (1.3%). (see [Table 1](#)).

When comparing Q1:2025 vs Q4:2024, poultry imports also decreased by 6.6%. According to [Table 1](#), boneless chicken other (84.9%), boneless chicken breasts (68.0%), and frozen bone-in chicken breasts (58.2%) were the main drivers of the observed decline in imports during this time.

Table 1: South Africa's chicken meat imports by volume (tons)

Tariff description	HS Code	Q1: 2024	Q4: 2024	Q1: 2025	Q1: 2024 vs Q1: 2025	Q1: 2025 vs Q4: 2024
		Tons	Tons	Tons	Annually % Change	Quarterly % Change
Frozen chicken MDM	0207.1210	53 818	66 372	54 522	1.3	-17.9
Frozen chicken carcasses	0207.1220	3 958	1 431	1 789	-54.8	25.0
Whole frozen chicken	0207.1290	2 953	1 389	1 082	-63.4	-22.1
Fresh chicken cuts	0207.1300	25	0	0	0	0
Boneless chicken breasts	0207.1411	1 198	25	8	-99.3	-68.0
Boneless chicken thighs	0207.1413	0	0	0	0	0
Boneless chicken other	0207.1415	189	318	48	-74.6	-84.9
Frozen chicken livers	0207.1421	2 729	1 784	1 825	-33.1	2.3
Frozen chicken feet	0207.1423	11 389	12 428	14 815	30.1	19.2
Frozen chicken heads	0207.1425	0	0	0	0	0
Frozen chicken offal	0207.1429	6 674	4 777	5 175	-22.5	8.3
Frozen half chicken	0207.1491	21	0	0	0	0
Frozen chicken leg quarter	0207.1493	7 020	3 384	4 823	-31.3	42.5
Frozen chicken wings	0207.1495	2 713	616	1 068	-60.6	73.4
Frozen bone-in chicken breast	0207.1496	216	158	66	-69.4	-58.2
Frozen chicken thighs	0207.1497	1 836	39	97	-94.7	148.7
Frozen chicken Drumsticks	0207.1498	3 306	357	733	-77.8	105.3
Value-added processed	1602.3290	98	317	448	357.0	41.3
Other	0207.1499	214	182	324	51.2	78.0
TOTAL IMPORTS		98 358	93 577	87 375	-11.2	-6.6

Source: SARS, 2025

4. Average producer price trends

Figure 2 shows typical producer prices for frozen chicken (maximum brine allowed 10%), whole fresh chicken, and Individual Quick Frozen (IQF) chicken pieces (maximum brine allowed 15%) from the first quarter of 2014 to the first quarter of 2025. When comparing the first quarters (January-March) of 2025 and 2024, producer prices for frozen chicken and fresh chicken decreased by 7.18% and 1.74%, respectively, while prices for IQF increased by 1.22%.

When comparing the first quarter of 2025 with the fourth quarter of 2024, producer prices for frozen chicken decreased by 0.48% while fresh chicken and IQF chicken increased by 5.03% and 4.46%, respectively. Various factors have contributed to the recent trends in producer prices, and these include increasing availability, decreased import prices, lower input costs, and shifting customer tastes.

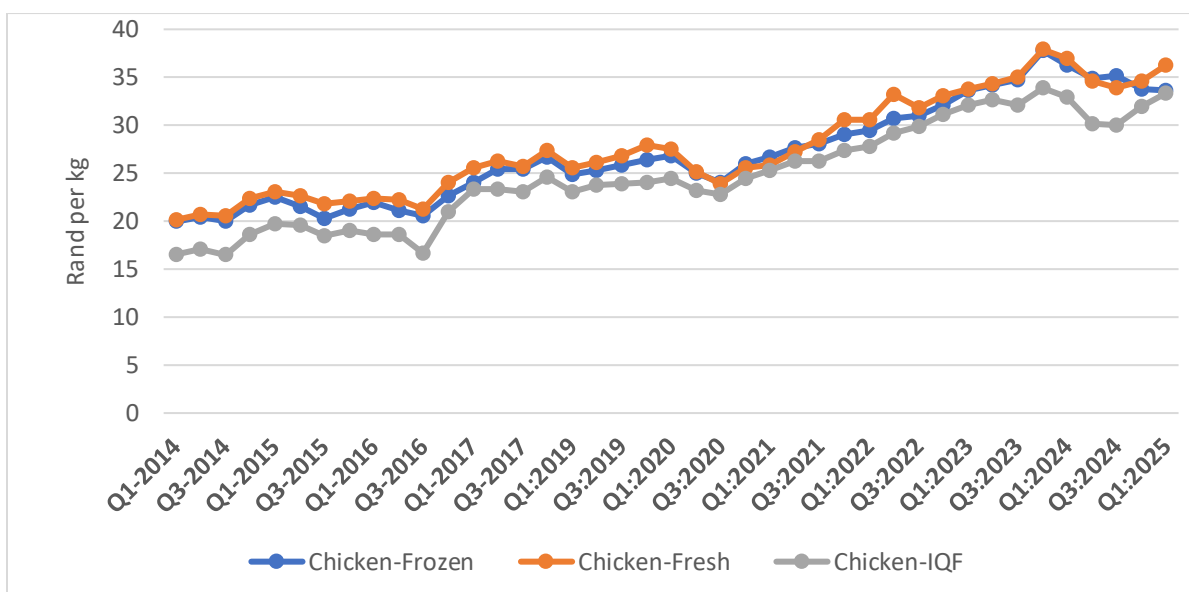


Figure 2: Quarterly average producer prices

Source: AMT, 2025

5. Average retail prices for selected poultry products

Figure 3 presents average quarterly retail prices for selected chicken products from the first quarter (January-March) of 2025 to the first quarter of 2024. Over this period, prices for chicken giblets per kg, whole chicken, and fresh chicken portions decreased by 3.01%, 3.42%, and 0.73%, respectively. However, the price of portions for frozen non-IQF and IQF chicken portions increased by 3.85% and 3.20%, respectively.

Between the first quarter of 2025 and the fourth quarter of 2024, poultry retail prices experienced mixed signals, with some increasing while others decreased. Notably, the price for whole fresh chicken decreased by 1.5% while chicken giblets and fresh chicken portions each decreased by 0,10%.

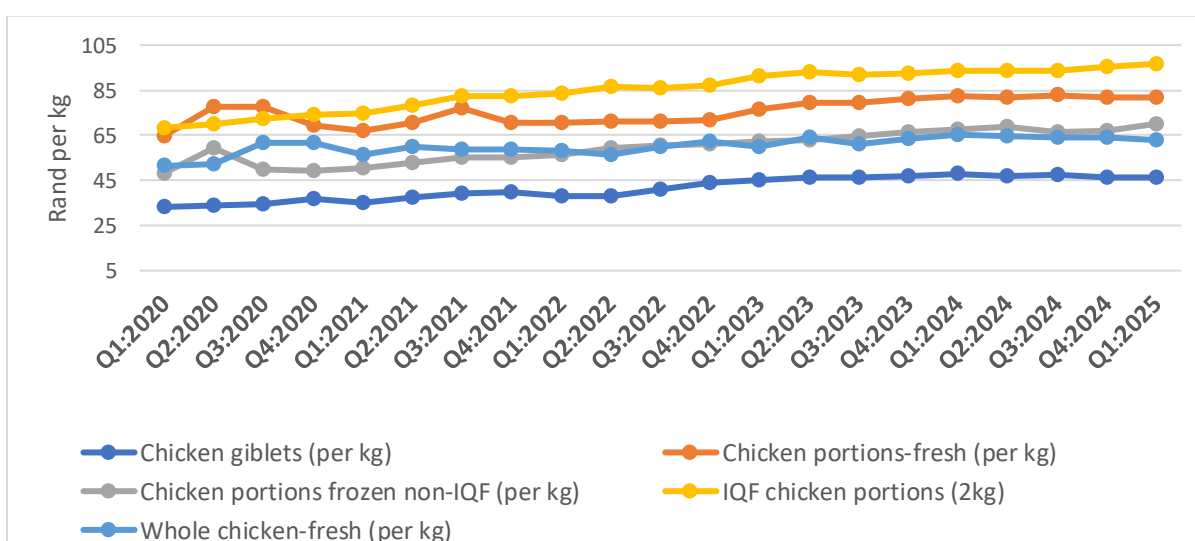


Figure 3: Average quarterly retail prices for selected processed and unprocessed chicken products.

Source: Stats SA, 2025

6. Feed prices

Figure 4 presents the quarterly SAFEX spot prices for yellow maize, sunflower seed, and soybeans. In the first quarter of 2025, the average spot price for a ton of yellow maize was R5 153, indicating a 31.90% increase compared to the corresponding period (Q1) in 2024, and was 6.36% higher than the fourth quarter of 2024. On the other hand, sunflower seed prices increased to R9 460 per ton during quarter 1 of 2025, reflecting a 9.61% increase compared to the same period the previous year, but a 6.76% decline in Q1:2025 when compared to the preceding quarter (Q4: 2024). While for soybean, the average spot price stood at R9 070 in the first quarter of 2025, representing an 8.60% increase and 2.34% increase, respectively, when compared to the first quarter of 2025 and the fourth quarter of 2024.

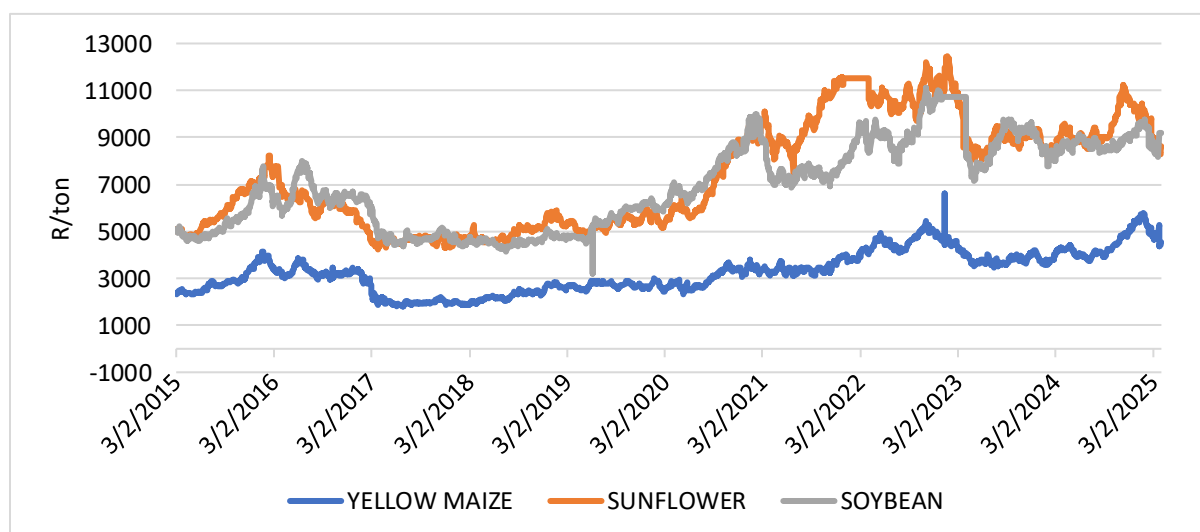


Figure 4: Quarterly spot prices per ton

Source: JSE-SAFEX, 2025

7. Real Farm to Retail Price Spread

Figure 5 presents quarterly changes in the real farm-to-retail price spread (FTRPS) and the proportion of real farm value. The FTRPS represents the difference between what consumers pay for a food product at retail and the actual value of the farm product used in its production.

Analysing the period from February to April 2025, there is an 8.44% increase in the real farm value share, with a 13.67% decrease in the real FTRPS for whole fresh chicken. The real farm value share for whole fresh chicken reached 60.80% in April 2025. Over the year-on-year span from April 2024 to April 2025, the real farm value share increased by 9.71%, while the real FTRPS decreased by 18.03%. This could be due to the competitiveness in the poultry value chain being affected by factors such as imports and feed prices, among other factors.

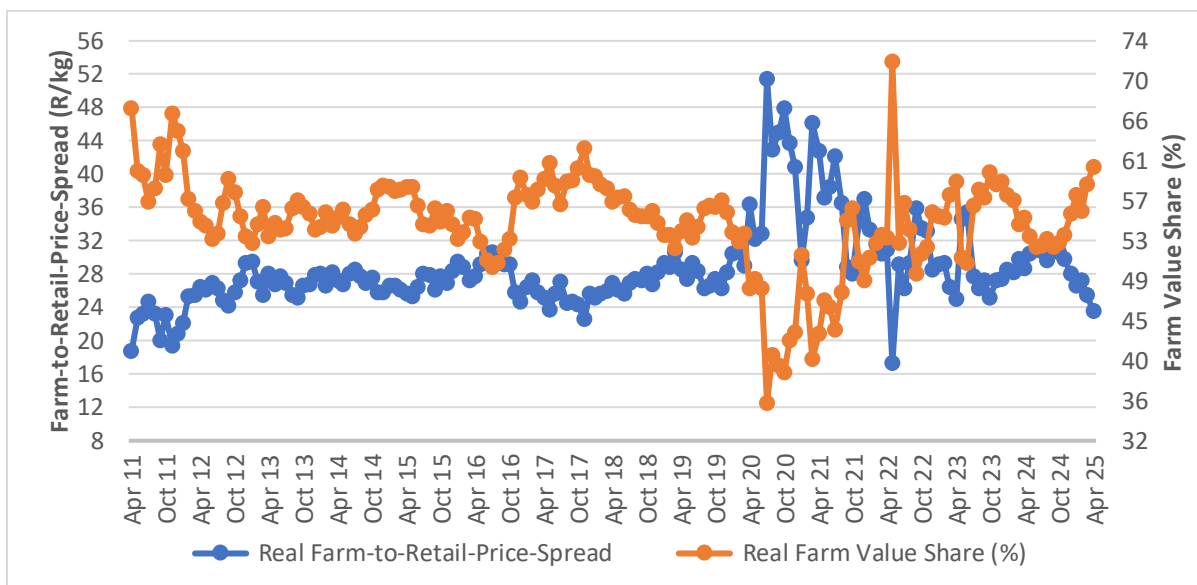


Figure 5: Real farm-to-retail-price-spread and farm value share of poultry

Source: Stats SA, AMT, and own calculations, 2025

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