



# **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 second quarter of 2025 stood at 115.9 points, marking a 2.24% increase compared to the 113.38 points recorded in the second quarter of 2024.
- During the first quarter (Q2) of 2025: On a year-on-year comparison, data from the South African Revenue Service (SARS) indicates that South Africa imported a total of 74 012 tons of chicken meat in Q2: 2025, indicating a 32.17% decrease from the 109 107 tons imported in Q2: 2024. On a quarter-on-quarter basis, imports fell sharply by 15.29% compared with Q1 of 2025.
- The Average Producer Price Trend indicates that Quarter 2 (April - June) of 2024 and 2025, producer prices for frozen chicken, fresh chicken, and IQF chicken increased by 1.06, 10.75%, and 14.70%, respectively. When comparing the second quarter of 2025 with the first quarter of 2025, producer prices for frozen chicken increased by 4.78% while fresh chicken and IQF chicken increased by 5.69% and 3.63%, respectively. When comparing retail prices per kilogram (kg) for the second quarter of 2025 to the first quarter of 2025, the price for whole chicken declined by 1.34%, while chicken giblets and fresh chicken portions increased by 0.54% and 1.26, respectively.
- During the second quarter of 2025, the average spot prices yellow maize, sunflower seed, and soybeans declined. For instance, the average spot price for a ton of yellow maize was R4 346, indicating a 6.19% increase compared to the corresponding period (Q2) in 2024, and was 15.65% lower than the first quarter of 2025. On the other hand, the average sunflower seed price was R8 997 per ton during quarter 2 of 2025, reflecting a 0.14% decrease compared to the same period the previous year. Moreover, the average price represents a 4.89% decline when compared to the prices between Quarter 1 (Jan-Mar) and Quarter 2 (April-June) of 2025. For soybean, the average spot price stood at R7 413 in the second quarter of 2025, representing a 15.63% and 18.27% decrease between Quarter 2 of 2025 and the corresponding period in 2024.

## Contents

1. Introduction .....	2
3. Chicken meat imports .....	3
4. Average producer price trends .....	5
5. Average retail prices for selected poultry products.....	5
6. Feed prices .....	6
7. Real Farm to Retail Price Spread .....	7

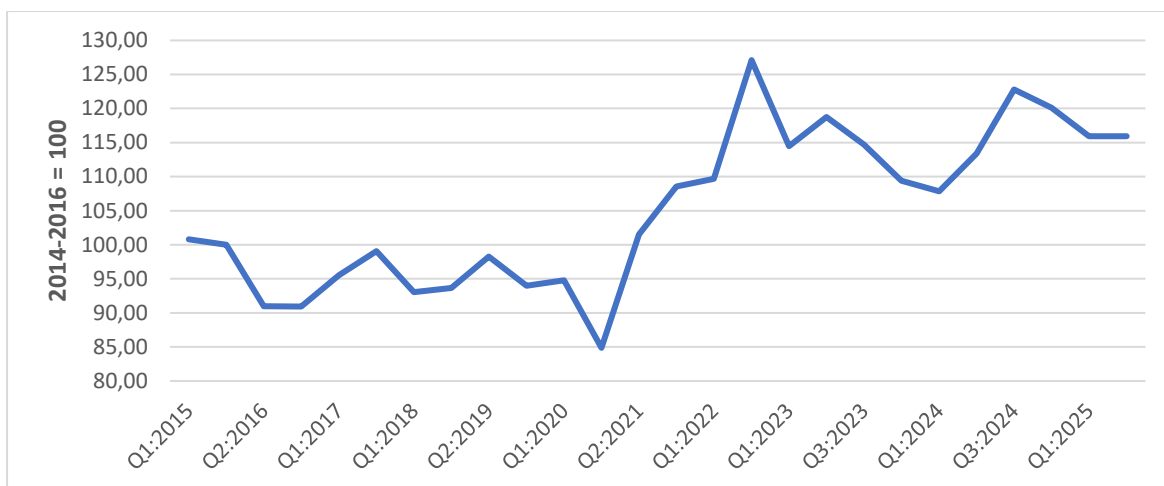
## 1. Introduction

Poultry remains the cornerstone of South Africa’s food security landscape, not only as a dietary preference, but also serves as both a nutritional anchor and vital economic stabilizer within the national food system. This report tracks price trends of poultry across the South African value chain, positioning them within broader global market developments to better understand the interplay between international pressures and domestic realities. 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. The report covers a comprehensive set of indicators, including international poultry meat price indices, chicken import volumes, producer and retail price changes, and feed input costs; all assessed quarterly.

## 2. International poultry meat price index

In **Figure 1**, the international poultry meat price index (base years 2014 – 2016 = 100) traces the trajectory over the years. According to FAO data, the index in Q2 2025 (April – June) averaged 115.9 points, reflecting a 2.24% increase over the 113.38 points recorded in Q2 2024. Remarkably, the same 115.9-point level was maintained in Q1 (January – March) of 2025, implying zero quarter-on-quarter movement between Q1 and Q2 2025.

This relatively flat quarter-on-quarter trend suggests a plateauing in international poultry price pressure during early 2025. However, the year-on-year rise of 2.24% suggests that upward momentum remains, driven perhaps by global demand stability or supply constraints.



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

Source: FAO, 2025

### 3. Chicken meat imports

Poultry imports play a crucial role in supplementing South Africa's domestic chicken supply, helping to stabilize prices, support food security, and meet the growing consumer demand. During the second quarter of 2025 (April – June), the country experienced a notable contraction in poultry import volumes, largely due to trade disruptions. According to data from the South African Revenue Service (SARS), SA imported 74 012 tons of chicken meat in Q2:2025, marking a 32.17% year-on-year decline from 109 107 tons recorded in Q2:2024. On a quarter-on-quarter basis, imports fell sharply by 15.29% compared with Q1 of 2025 (January – March)

Between Q1 and Q2 of 2025, Frozen Chicken mechanically deboned meat (MDM) imports declined by 17.1%. On an annual comparison, several product categories reflected steep declines, with Boneless chicken breasts recording the largest year-on-year decline of 82.1%, followed by Fresh Chicken Cuts and Offal, which contracted by 79.1%. The significant declines coincide with the temporary suspension of poultry imports from Brazil in mid-May 2025, following the outbreak of Highly Pathogenic Avian Influenza (HPAI).

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

Tariff description	HS Code	Q2: 2024	Q1: 2025	Q2: 2025	Q2: 2025 vs Q2: 2024	Q2: 2025 vs Q1 2025
		Tons	Tons	Tons	Annual % Change	Quarterly % Change
Frozen chicken MDM	0207.1210	55921	54 522	45 212	-19.1	-17.1
Frozen chicken carcasses	0207.1220	5668	1 789	1 865	-67.1	4.2
Whole frozen chicken	0207.1290	2626	1 082	952	-63.7	-12.0
Fresh chicken cuts and offal	0207.1300	1	0	0	-79.1	0
Boneless chicken breasts	0207.1411	194	8	35	-82.1	332.6
Boneless chicken thighs	0207.1413	0	0	0	0	0
Boneless chicken other	0207.1415	465	48	350	-24.7	629.2
Frozen chicken livers	0207.1421	4193	1 825	2 561	-38.9	40.3
Frozen chicken feet	0207.1423	16294	14 815	10 930	-32.9	-30.9
Frozen chicken heads	0207.1425	0	0	0	0	0
Frozen chicken offal	0207.1429	10030	5 175	3 714	-63.0	-28.2
Frozen half chicken	0207.1491	11	0	8	-26.6	0
Frozen chicken leg quarter	0207.1493	9652	4 823	5 482	-43.2	13.7
Frozen chicken wings	0207.1495	2917	1 068	1 423	-51.2	33.3
Frozen bone-in chicken breast	0207.1496	35	66	27	-22.3	-58.8
Frozen chicken thighs	0207.1497	79	97	37	-53.5	-62.1
Frozen chicken Drumsticks	0207.1498	691	733	459	-33.5	-37.4
Value-added processed	1602.3290	44	448	394	795.1	-12.1
Other	0207.1499	287	324	563	96.3	73.8
<b>TOTAL IMPORTS</b>		<b>109 107</b>	<b>87 375</b>	<b>74 012</b>	<b>- 32.17</b>	<b>-15.29</b>

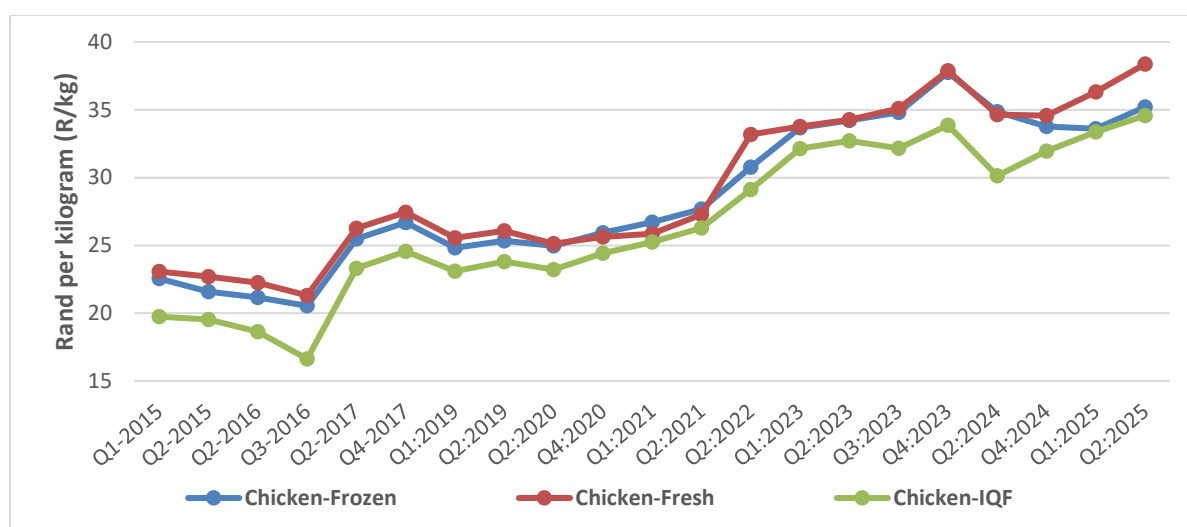
Source: SARS, 2025



## 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 2015 to the second quarter of 2025. When comparing the second quarters (April - June) of 2024 and 2025, producer prices for frozen chicken, fresh chicken, and IQF chicken increased by 1.06%, 10.75%, and 14.70%, respectively.

When comparing the second quarter of 2025 with the first quarter of 2025, producer prices for frozen chicken increased by 4.78% while fresh chicken and IQF chicken increased by 5.69% and 3.63%, respectively.



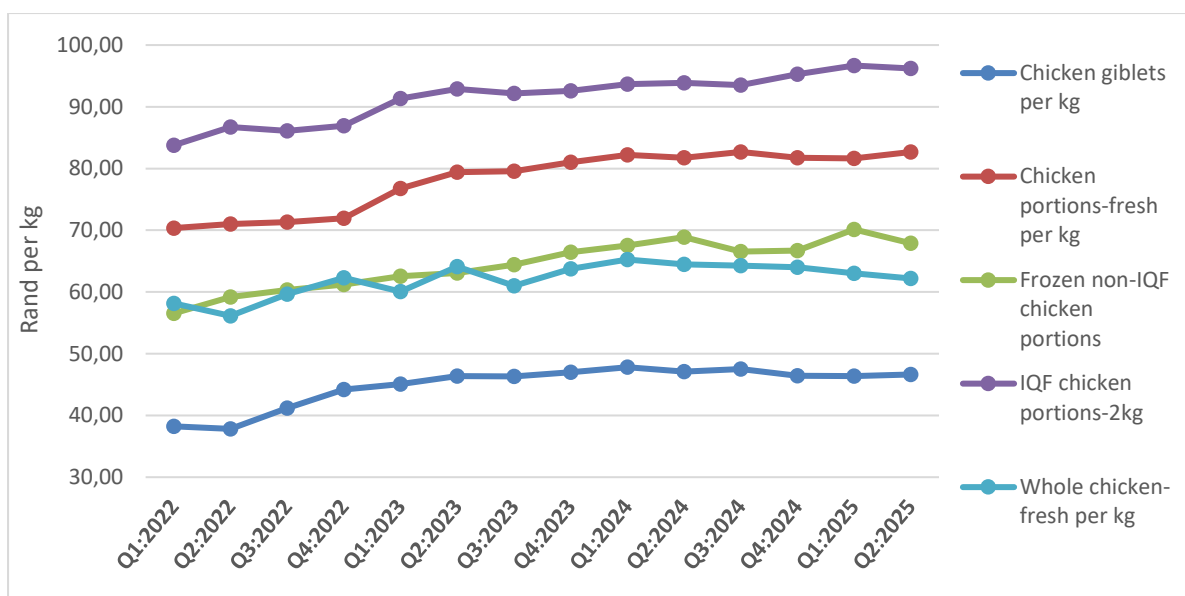
**Figure 2: Quarterly average producer prices**

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 of 2022 to the second quarter (April – June) of 2025. Over a year (Q2 2024 – Q2 2025), the prices per kilogram (R/kg) for chicken giblets, frozen non-IQF chicken portions, and fresh whole chicken decreased by 1.05%, 1.45%, and 3.55%, respectively. However, the price of fresh chicken portions per kg and IQF chicken portions 2 kg increased by 1.10% and 2.47%, respectively.

Between Q1 and Q2 2025, the price for whole fresh chicken decreased by 1.34% while chicken giblets and fresh chicken portions increased by 0.54% and 1.26%, respectively

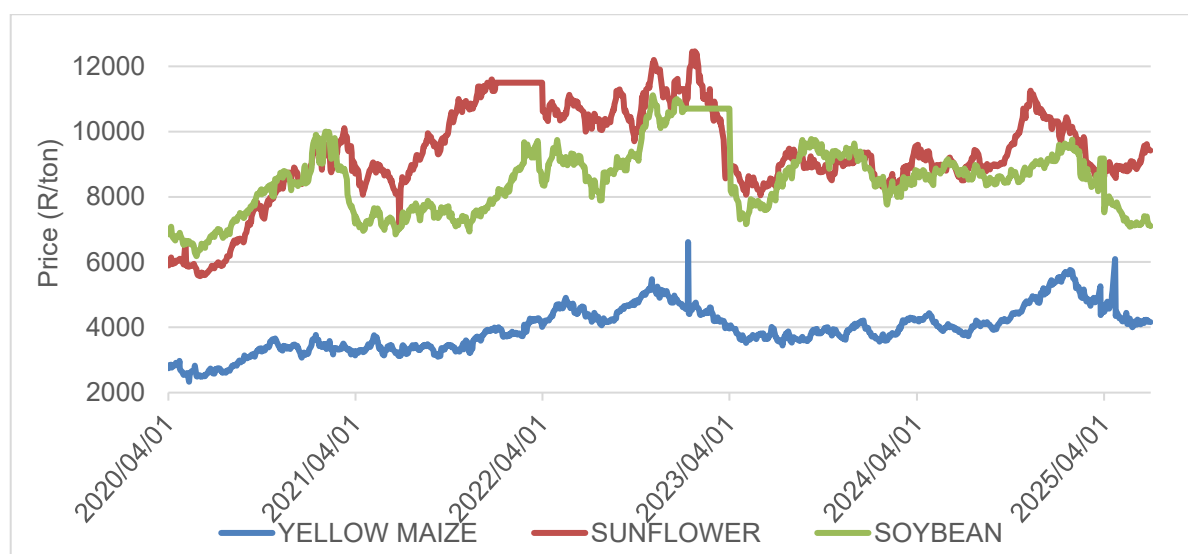


**Figure 3: Average quarterly retail prices for selected processed and unprocessed chicken products.**

Source: Stats SA, 2025

## 6. Feed prices

**Figure 4** presents the quarterly SAFEX spot prices for yellow maize, sunflower seed, and soybeans. In the second quarter of 2025, the average spot price for a ton of yellow maize was R4 346, indicating a 6.19% increase compared to the corresponding period (Q2) in 2024, and was 15.65% lower than the first quarter of 2025. On the other hand, sunflower seed price declined to R8 997 per ton during quarter 2 of 2025, reflecting a 0.14% decrease compared to the same period the previous year. Moreover, this is equivalent to a 4.89% decline between Quarter 1 (Jan-Mar) and Quarter 2 (Apr-June) of 2025. For soybeans, the average spot price stood at R7 413 in the second quarter of 2025, representing a 15.63% and 18.27% decrease between Quarter 2 of 2025 and the corresponding period in 2024, respectively.



**Figure 4: Quarterly spot prices of selected grains**

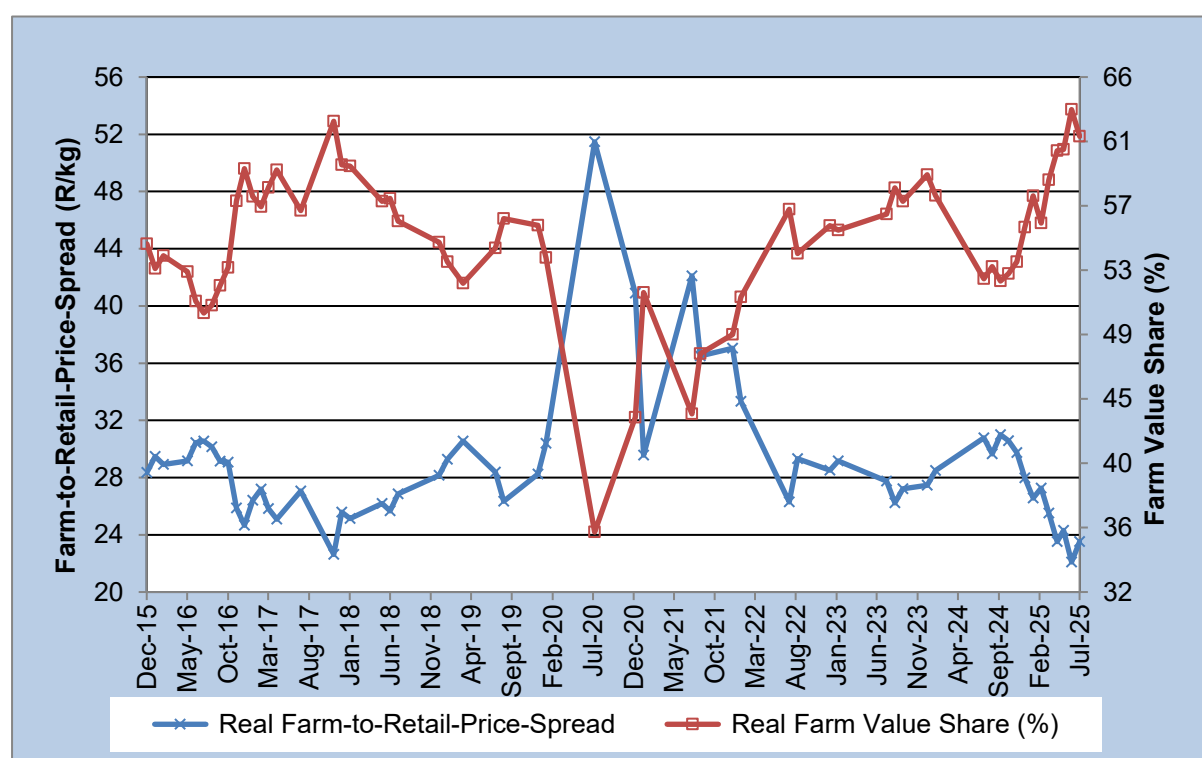
Source: JSE-SAFEX, 2025

The combined picture: feed grain costs remain volatile but reflect a degree of relief in Q2 compared to Q1 2025, particularly for soybeans. The easing alleviated some pressure on poultry producers, although maize costs remained comparatively firmer.

## 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 between December 2015 and July 2025. 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 May to July 2025, there is a 1.42% increase in the real farm value share, with a 3.19% decrease in the real FTRPS for whole fresh chicken. The real farm value share for whole fresh chicken reached 61.74% in July 2025. Over the year-on-year span from July 2024 to July 2025, the real farm value share increased by 17.74%, while the real FTRPS decreased by 23.55%. 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

These shifts imply that over time, a much larger proportion of the consumers' Rand is being captured by farm-level producers, leaving less being absorbed by downstream margins. In effect, margin compression downstream suggests increased competitive pressure, cost absorption by middle stages, or rising farm pricing power.



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