



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 third quarter of 2025 stood at 115.0 points, marking a 0.79% decline compared to the 115.9 points recorded in the second quarter of 2025. On an annual basis, the index reflected a 6.35% decrease, moving from 122.79 points in Q3 of 2024 to 115.0 points in Q3 2025.
- During the third quarter (Q3) of 2025: On a year-on-year comparison, data from the South African Revenue Service (SARS) indicates that South Africa imported a total of 64 855 tons of chicken meat, indicating a 35% decrease from the 99 312 tons imported in Q3: 2024. On a quarter-on-quarter basis, imports declined by 12% compared with Q2 of 2025. Frozen half chicken, frozen bone-in chicken breast, and boneless chicken breast decreased by 100%, 65%, and 54%, respectively.
- The Average Producer Price Trend indicates that Quarter 3 (July - Sep) of 2024 and 2025, producer prices for frozen chicken, fresh chicken, and IQF chicken increased by 0.82%, 17.66%, and 17.85%, respectively. When comparing the second quarter of 2025 with the first quarter of 2025, producer prices for frozen chicken decreased by 1.11% while fresh chicken and IQF chicken increased by 3.77% and 2.53%, respectively.
- When comparing retail prices per kilogram (kg) for the second quarter of 2025 to the third quarter of 2025, the price for whole chicken declined by 0.39%, while the price for chicken giblets and fresh chicken portions increased by 4% and 1.73% respectively.
- In the third quarter of 2025, the average spot price for a ton of yellow maize was R3 887, indicating a 4.10% decline compared to the corresponding period (Q3) in 2024, and was 10.58% lower than the second quarter of 2025. On the other hand, the price of sunflower seed increased to R9 957 per ton during quarter 3 of 2025, reflecting a 10.1% increase compared to the same period the previous year. Moreover, a 10.67% increase is noted between Quarter 2 and Quarter 3 of 2025. For soybean, the average spot price stood at R7 241 in the third quarter of 2025, representing a 15.24% and 2.32% decrease between Quarter 3 of 2025 and the corresponding period in 2024, and the price difference between Q2 and Q3 of 2025, respectively.

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1. Introduction

Poultry remains the cornerstone of South Africa’s food security landscape, not only as a dietary preference, but serves as both a nutritional anchor and vital economic stabilizer within the national food system. This report provides a detailed tracking of poultry pricing trends across the South African value chain, situating 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 on a quarterly basis.

International poultry meat price index

In **Figure 1**, the international poultry meat price index (base years 2014 – 2016 = 100) traces the trajectory from Quarter 1 (January – March 2024) through Quarter 3 (July – September 2025). According to FAO data, the index in Q3 2025 averaged 115.0 points, reflecting a 6.35% decrease from the 122.79 points recorded in Q3 2024. This decline suggests the easing of global market conditions for poultry products, such as increased global supply and reduced international demand or a combination of both. Several factors are attributable to this decline, such as the recovery in major producing countries after earlier disruptions (such as the avian influenza). The contraction of the index in Q3, particularly when compared to Q2, indicates a cooling period in the international market after earlier tight margins in 2025.

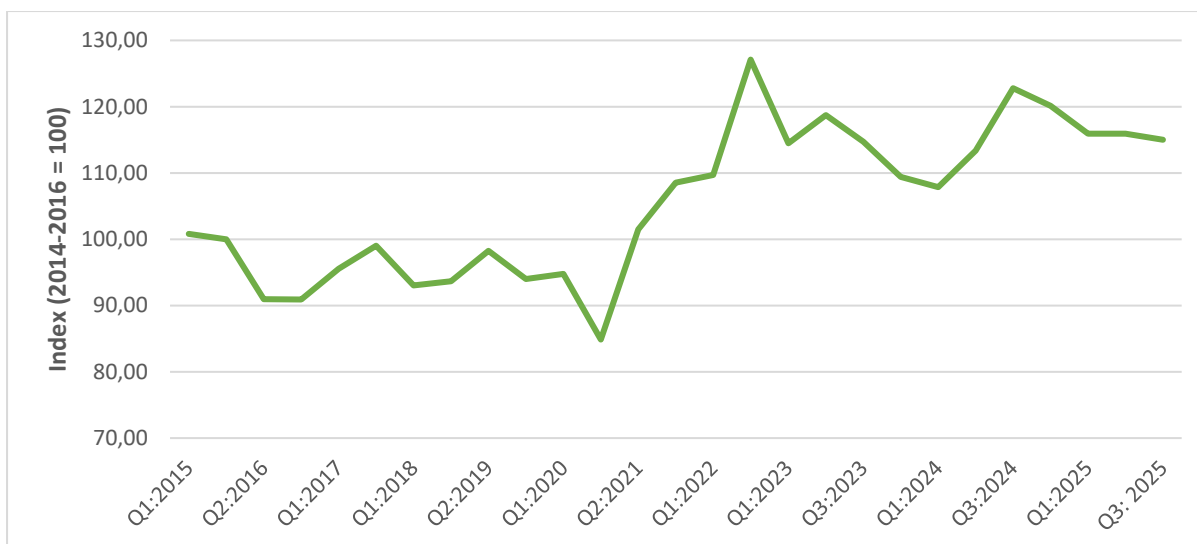


Figure 1: International Poultry Meat Real Price Index (IPMRPI)

Source: FAO, 2025

2. Chicken meat imports

Poultry imports play a crucial role in supplementing South Africa's domestic chicken meat supply, helping to stabilize prices, support food security, and meet the growing consumer demand. During the third quarter of 2025 (July – September), South Africa lifted the nine-week ban on Brazilian poultry imports in August 2025, creating a window for potential recovery within the quarter. **Table 1** below indicates that total imports in Q3 amounted to 64 855 tons, decreasing from 74 012 tons in Q2. This reflects a quarterly decline despite the reopening of the Brazilian supply channels. Lower quantity of total poultry meat imports during the quarter under review is attributable to the timing, as reduced shipments in the earlier part of Q3 could not be fully offset by the rebound later in the quarter. Quarterly, frozen chicken thighs, frozen chicken leg quarters, and frozen chicken drumsticks accounted for the highest increases at 192%, 63%, and 62%, respectively. This implies that these products responded fastest post the import ban. Contrary to the above, frozen half chicken, frozen bone-in chicken breast, and boneless chicken breast accounted for the highest declines of imported poultry products, decreasing by 100%, 63%, and 54%, respectively. The continued decline from these products may imply ongoing supply tightness or a lag in exporter prioritization.

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

Tariff description	HS Code	Q3: 2024	Q2: 2025	Q3: 2025	Q3: 2025 vs Q3: 2024	Q3: 2025 vs Q2:2025
		Tons	Tons	Tons	Annual % Change	Quarterly % Change
Whole fresh chicken	0207.1100	53	0	0	-100	0
Frozen chicken MDM	0207.1210	62 976	45 212	34 250	-46	-24
Frozen chicken carcasses	0207.1220	3 304	1 865	1 630	-51	-13
Whole frozen chicken	0207.1290	2 104	952	457	-78	-52
Fresh chicken cuts and offal	0207.1300	0	0	0	0	-21
Boneless chicken breasts	0207.1411	30	35	16	-46	-54
Boneless chicken thighs	0207.1413	0	0	0	0	0
Boneless chicken other	0207.1415	244	350	241	-1	-31
Frozen chicken livers	0207.1421	2 812	2 561	1 798	-36	-30
Frozen chicken feet	0207.1423	13 536	10 930	10 636	-21	-3
Frozen chicken heads	0207.1425	0	0	0	0	0
Frozen chicken offal	0207.1429	7 971	3 714	3 412	-57	-8
Frozen half chicken	0207.1491	8	8	0	0	-100
Frozen chicken leg quarter	0207.1493	3 536	5 482	8 959	153	63
Frozen chicken wings	0207.1495	1 520	1 423	1 729	14	22
Frozen bone-in chicken breast	0207.1496	122	27	10	-92	-65
Frozen chicken thighs	0207.1497	55	37	107	94	192
Frozen chicken Drumsticks	0207.1498	611	459	744	22	62
Value-added processed	1602.3290	245	394	262	7	-33
Other	0207.1499	186	563	605	225	7
TOTAL IMPORTS		99 312	74 012	64855	-35	-12

Source: SARS, 2025

3. 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 third quarter of 2025. On an annual basis, producer prices for frozen chicken, fresh chicken, and IQF chicken portions increased by 0.82%, 17.66%, and 17.85%, respectively. The difference in percentage changes, suggests that consumer demand and cost pressures might not have been the same across the chicken products, considering that frozen chicken indicated a marginal increase of 0.82%.

When comparing the third quarter of 2025 with the second quarter of 2025, producer prices for frozen chicken declined by 1.11%, while fresh chicken and IQF chicken increased by 3.77% and 2.53%, respectively. As imports began to recover from August following the lifting of the ban on Brazilian poultry, competition in the frozen chicken category is likely to increase, resulting in a slight downward pressure on producer prices in that category. Meanwhile, fresh and IQF chicken are less influenced by imports and more reliant on local production conditions; these products continued to reflect rising domestic costs.

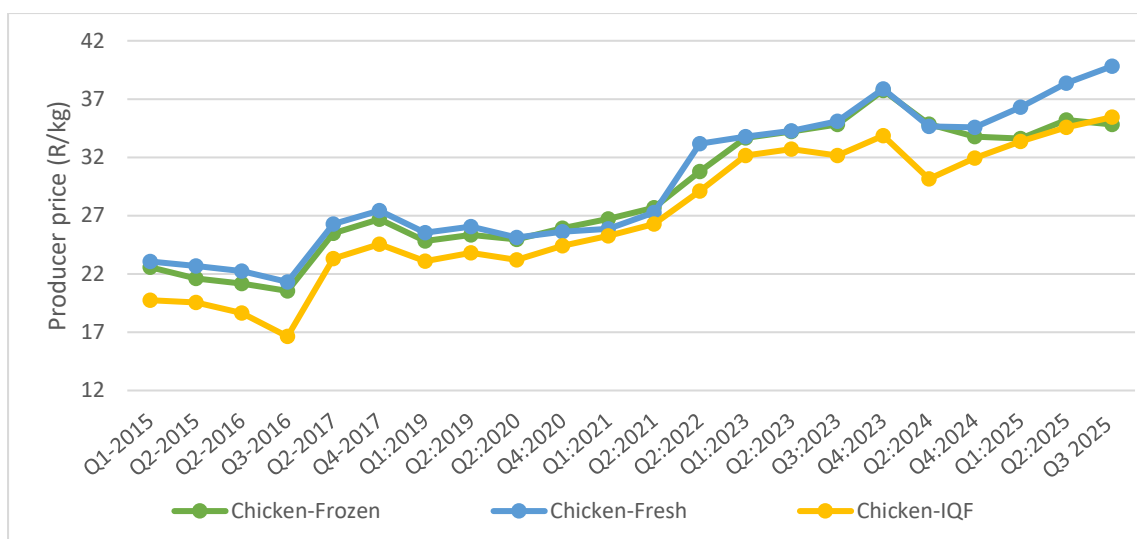


Figure 2: Quarterly average producer prices

Source: AMT, 2025

4. Average retail prices for selected poultry products

Figure 3 presents average quarterly retail prices for selected chicken products from the first quarter of 2015 to the third quarter (July – September) of 2025. Over one year (2024 Q3 – 2025 Q3), prices for chicken giblets per kg, fresh chicken portions per kg, frozen non-IQF chicken portions, and 2kg IQF chicken portions increased by 1.70%, 1.70%, 3.77 and 5.33%, respectively. These increases reflect the annual percentage increase in producer prices for fresh and IQF products. When producer prices rise, retailers eventually pass the cost through to consumers. However, the price of fresh whole chicken declined by 2.91%, and as a “price signal” good; retailers may have kept the price lower to attract consumers, even when costs are rising

Between Q2 and Q3 of 2025, the price for all selected products increased, with chicken giblets accounting for the highest change of 4% and fresh whole chicken the lowest change of 0.39%. This reflects that rising costs at the farm level eventually reach the shelf. The highest quarterly increase was in giblets, which often fluctuate more when supply availability shifts as this category constitutes a smaller proportion of the carcass.

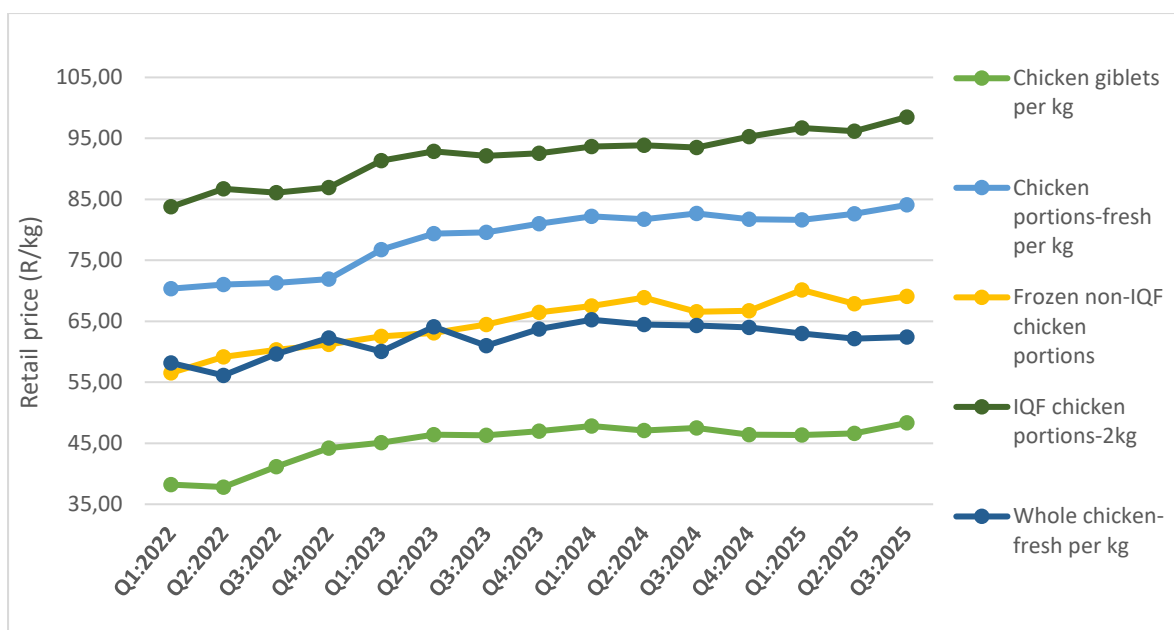


Figure 3: Average quarterly retail prices for selected processed and unprocessed chicken products.

Source: Stats SA, 2025

5. Feed prices

Figure 4 presents the quarterly SAFEX spot prices for yellow maize, sunflower seed, and soybeans. In the third quarter of 2025, the average spot price for a ton of yellow maize was R3 887, indicating a 4.10% decrease compared to the corresponding period (Q3) in 2024, and was 10.58% lower than the second quarter of 2025. On the other hand, sunflower seed price increased to R9 957 per ton during quarter 3 of 2025, reflecting a 10.10% increase compared to the same period the previous year; moreover, a 10.67% increase is noted between Quarter 2 and Quarter 3 of 2025. For soybeans, the average spot price stood at R7 241 in the third quarter of 2025, representing a 15.24% annual decline with the corresponding period in 2024. During this quarter, the average soybean price declined by 2.32%

While feed prices are easing relative to the earlier periods, the pattern of increasing sunflower prices and declining yellow maize and soybean prices indicates that producers may not experience full relief of feed costs. This balancing pattern between different feed ingredients explains why producer prices did not decline uniformly across all poultry categories.

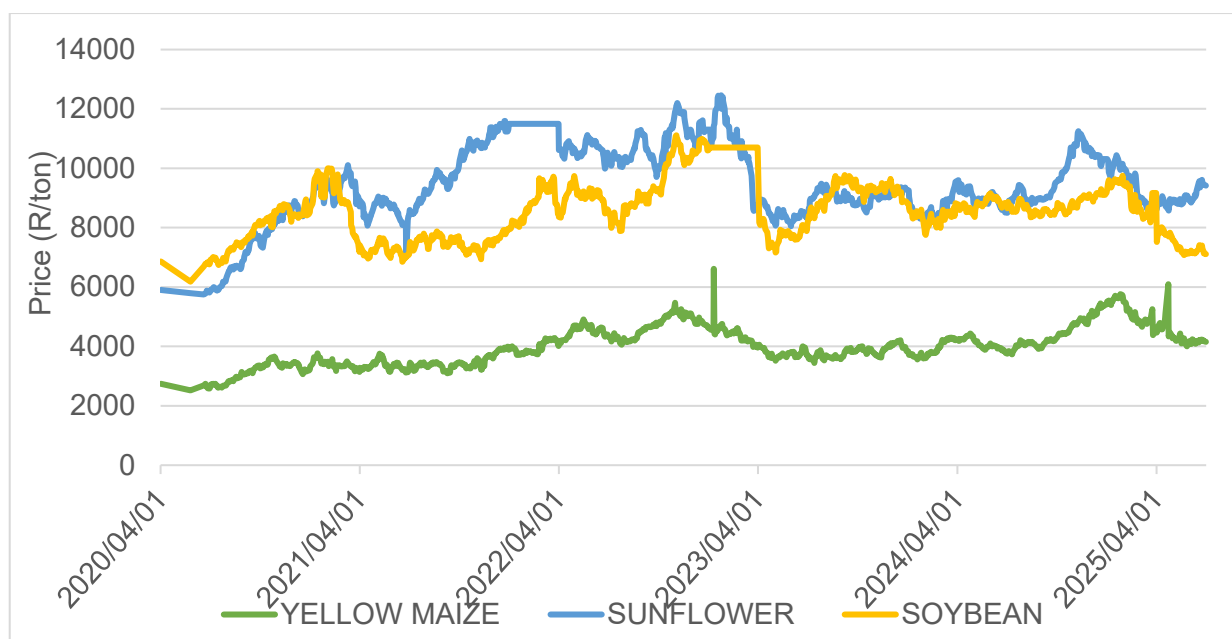


Figure 4: Quarterly spot prices per ton

Source: JSE-SAFEX, 2025

6. 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 July to September 2025, there is a 7.26% increase in the real farm value share, with a 15.08% decline in the real FTRPS for whole fresh chicken. The real farm value share for whole fresh chicken reached 66.21% in September 2025. Over an annual period from September 2024 to September 2025, the real farm value share increased by 26.64%, while the real FTRPS decreased by 35.57%.

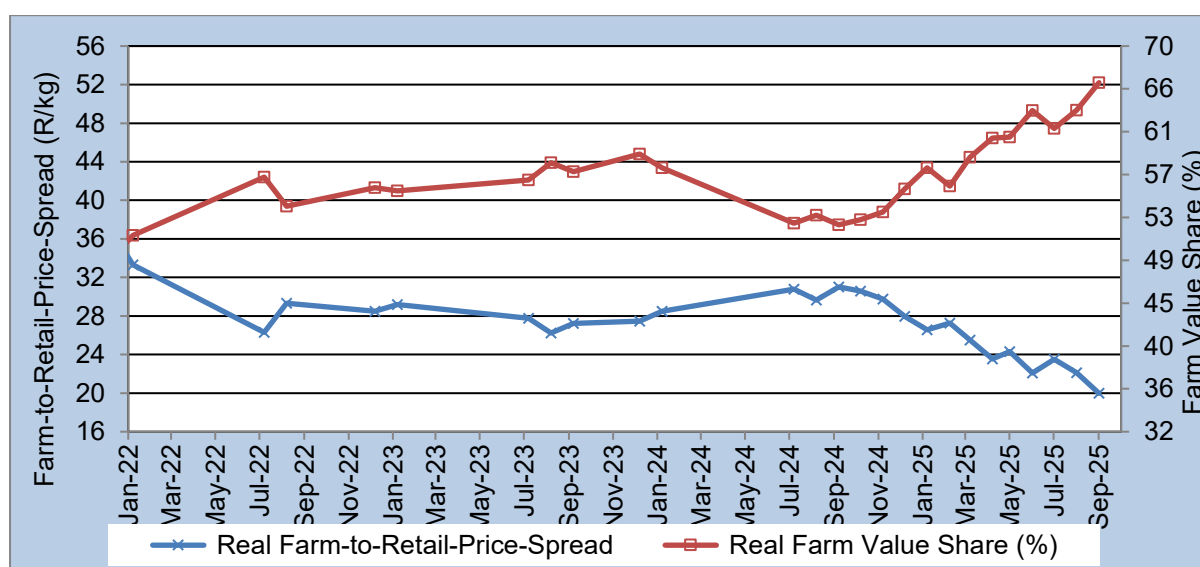


Figure 5: Real farm-to-retail-price-spread and farm value share of poultry

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

These trends suggest that farm gate prices have been rising faster than retail prices, or that retail margins have tightened due to competitive pressure among retailers. During the period where imports declined or domestic supply tightened, such as the months affected by the Brazilian ban, farm gate prices tend to tighten up because producers operate closer to capacity and face fewer external substitutes. The larger proportion of the retail price is received by the farmers, while processors and retailers absorb increased costs that compress their margins.

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