

SOUTH AFRICAN POULTRY MEAT IMPORTS: COUNTRY REPORT DECEMBER 2018

PLEASE NOTE:

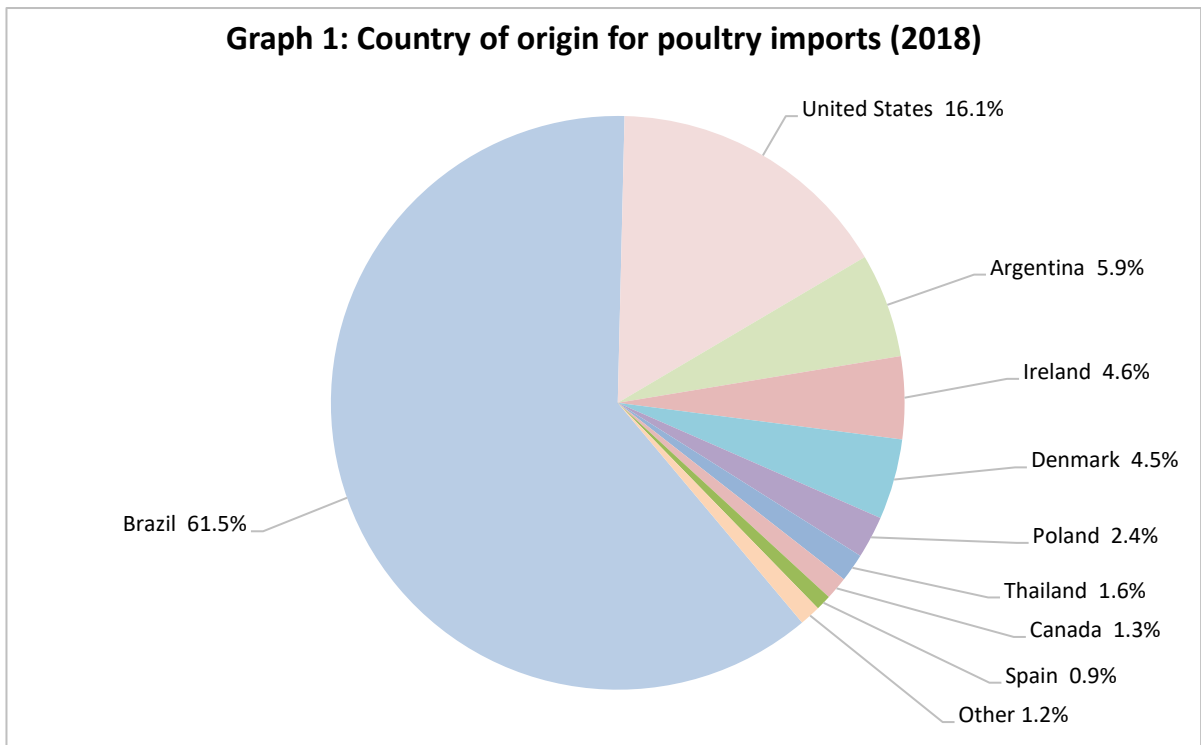
- This report is based on SARS verified stats. The verified stats will be corrected up to two years in arrears.
- Where the term 'poultry' is used, this may refer to imports of chicken, turkey, duck, goose or guinea fowl.

If, as a regular user of this report, you would like other data included or data presented in a different format (e.g. tables), please contact us on cynthia@silverpath.co.za with your suggestions.

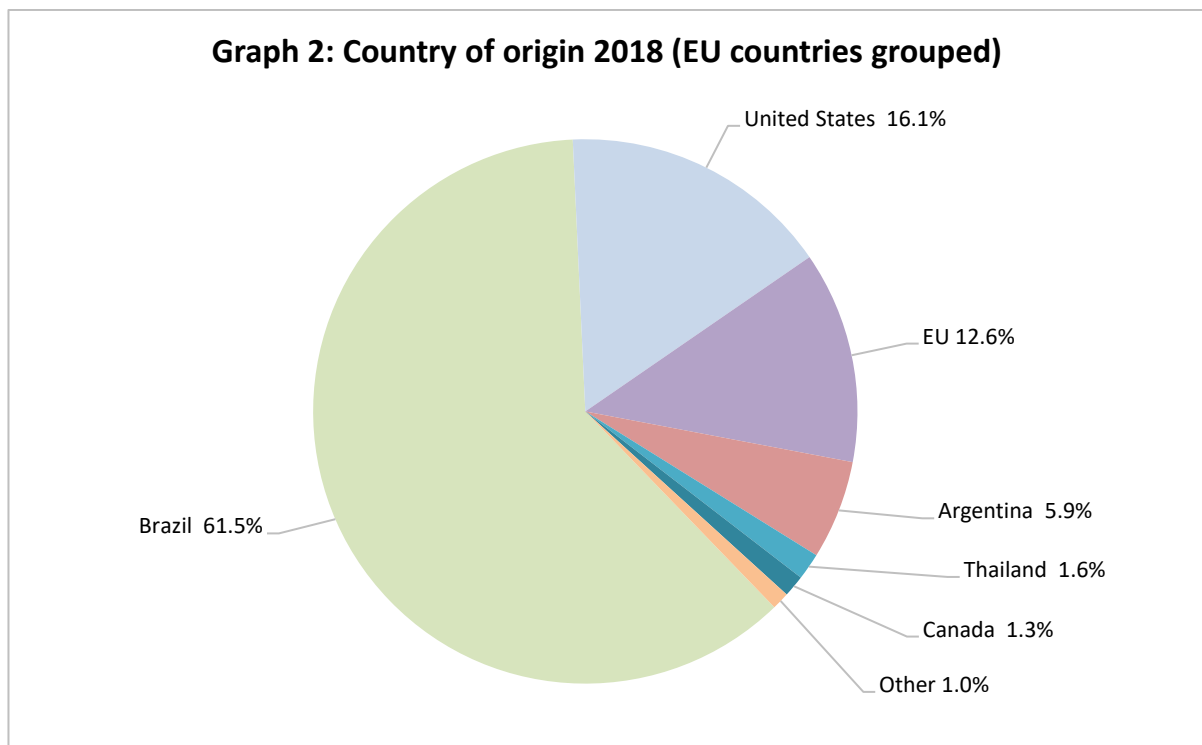
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1. IMPORTS FOR 2018

Poultry imports for 2017 totalled 556 877 t (- 0.6 % on 2016). Imports in 2018 (566 210 t) are up 1.7 % on 2017. Imports for 2018 were up 19 % over the 5-year average for poultry imports. The contributions from the major importing countries are shown in Graph 1:



Brazil was the main country of origin in 2018, accounting for 61.5 %, or 348 155 t, of total poultry imports into South Africa. With AI affecting EU trade, the US was the second largest importer into the country, with 16.1 % or 91 374 t. Argentina and Thailand increased exports to South Africa in the absence of many of the EU nations, to account for 5.9 % (33 278 t) and 1.6 % (9 011 t) of 2018 imports, respectively. Of the EU exporters, only Ireland, Denmark, Poland and Spain exported significant quantities to South Africa in 2018: 26 328 t (4.6 %), 25 672 (4.5 %), 13 463 t (2.4 %) and 4 932 t (0.9 %), respectively. Canadian exports to South Africa dropped compared to 2017 (7 305 t; 1.3 % of total). All other importing countries contributed only 1.2 % to imports of poultry into South Africa in 2018. If the EU countries are considered as a single entity, 12.6 % of poultry imports entered SA through the EU in 2018, compared to 14.0 % in 2017 and 48.1 % in 2016. This drop in 2018 reflects the impact of the trade bans on EU countries affected by avian influenza. In Graph 2, the EU countries are grouped together as a single entity.

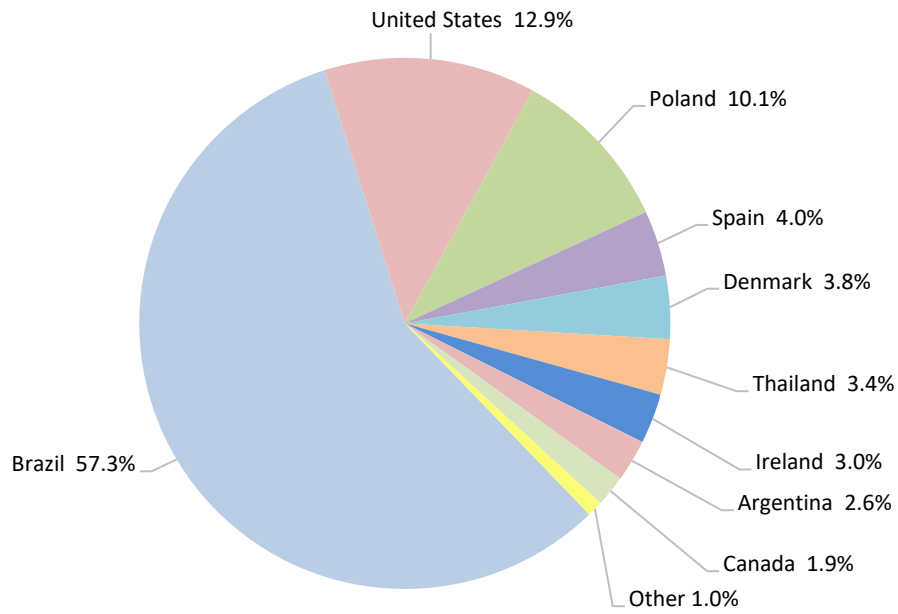


2. MONTHLY IMPORTS FOR DECEMBER 2018

Poultry imports into South Africa totalled 37 739 tonnes in December 2018. Since December 2016, Brazil has been the main country of origin for South African poultry imports, with the exception of March 2017 when the States landed over 25 000 t of poultry products here. In December 2018, Brazil accounted for 57.3 % or 21 637 t of total imports (Graph 3); *cf* just 37.9 % of total imports back in March 2017.

Under the terms of the AGOA agreement, US imports of frozen bone-in portions resumed in January 2016. The US may export 65 000 tonnes of bone-in frozen chicken per annum, free from anti-dumping duties (cycle April to March). The US holds on to second place on the imports table in December, with 4 860 tonnes (12.9 % of imports). The EU is beginning to claw its way back into the South African market: Poland and Spain have jumped into third and fourth position on the imports table with 3 822 t (10.1 %) and 1 510 t (4.0 %), respectively.

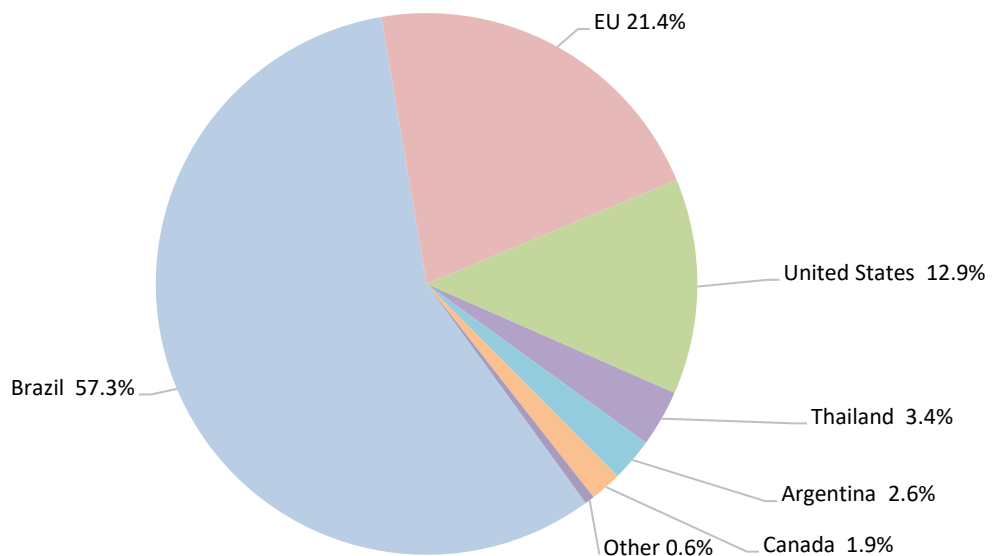
Graph 3: Poultry imports for December 2018



Avian influenza reduced Dutch, French, German, Polish, Hungarian and UK imports to almost zero for most of 2017 and early 2018. Belgium is currently not exporting to South Africa and only small volumes are arriving from the UK, France, the Netherlands and Germany.

Denmark and Ireland have, until recently, been the only European countries exporting to South Africa in any quantity. The Danes and Irish exported 1 447 t (3.8 %) and 1 145 t (3.0 %) in December, respectively. Thailand accounted for 3.4 % (1 276 t) of imports; Argentina 2.6 % (971 t) and Canada 1.9 % (710 t), respectively (see graph below). Imports from Argentina and Canada are coming under pressure as the EU nations return to the market. Collectively, other countries contributed 1.0 %.

Graph 4: Poultry imports for December 2018 (EU countries grouped)



Graph 4 (above) shows the origin of poultry imports in December 2018, with the EU countries grouped together as a single entity.

Imports from the EU contributed 21.4 % (8 070 t) of total poultry imports into South Africa in December (*cf* 63.1 % in November 2016). EU tonnages were down 12.6 % on a monthly basis but are up 83.1 % on a year-on-year basis. There is clear evidence that the EU is beginning to erode Brazilian market share in 4Q 2018, with Poland and Spain returning to the South African market strongly.

Most European HPAI events are now considered resolved (OIE) although the UK, the Netherlands, Germany, Denmark and Ireland all reported cases in wild birds in 2018 (see below under each country). The Netherlands and Germany have reported H5N6 in commercial and backyard poultry in 2018.

COUNTRIES OF ORIGIN

3.1 Poultry imports from Brazil

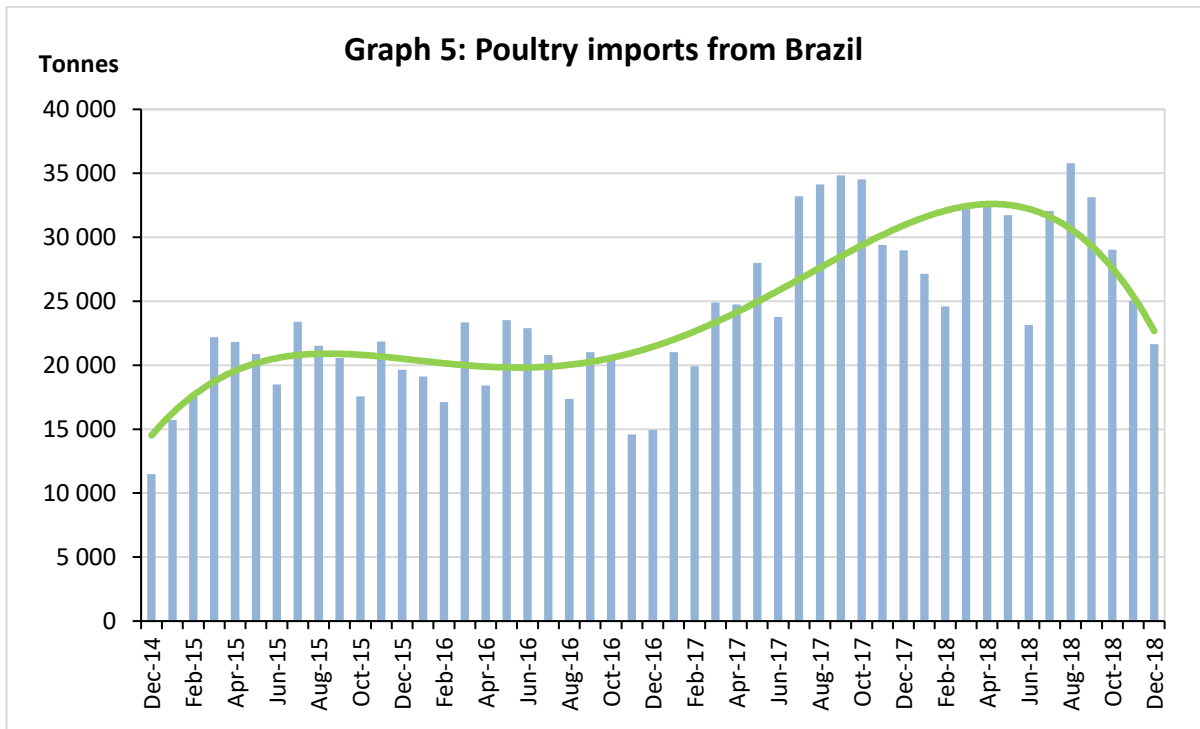
Poultry imports from Brazil totalled 21 637 t in December 2018, representing 57.3 % of total poultry imports in volume terms, with an FOB import value of R223.3 million. On a monthly basis, imports from Brazil decreased by 13.6 % (- 3 411 t). Imports decreased by 25.3 % (- 7 342 t) compared to December 2017.

Poultry imports from Brazil for December 2018:

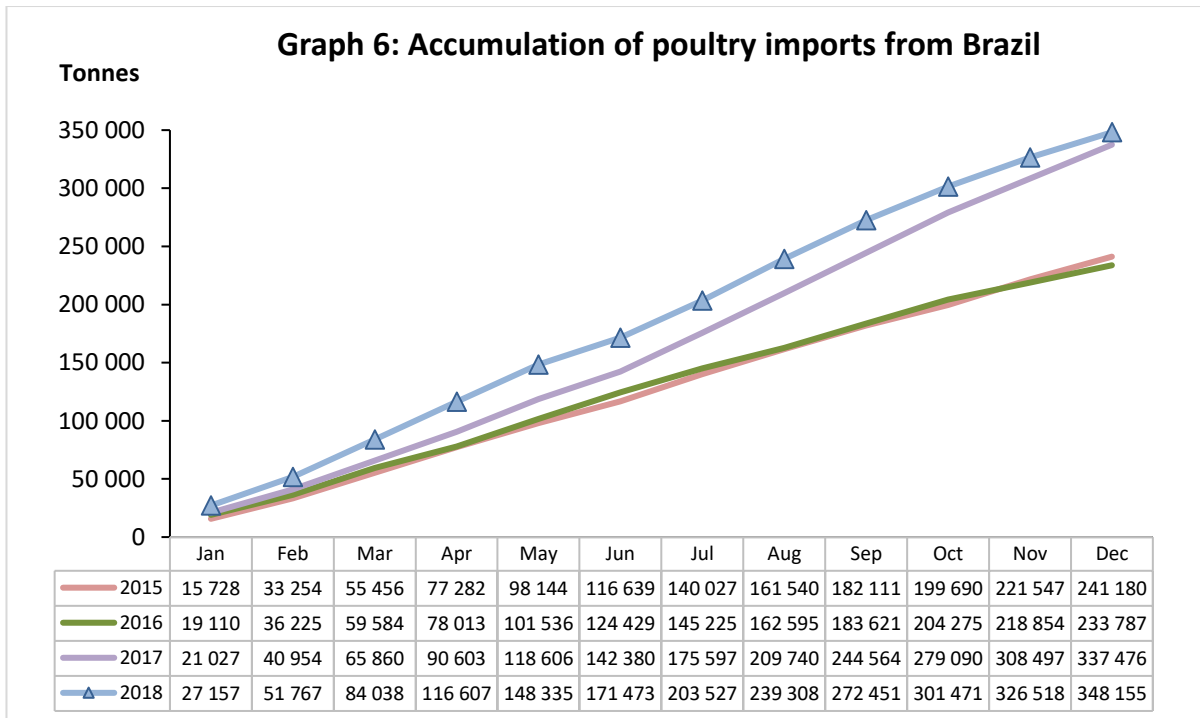
<i>Tariff</i>	<i>Description</i>	<i>Import Quantity in kg</i>	<i>FOB Import Price in R</i>	<i>Unit Price in R per kg</i>
0207.1210	Chicken: Not cut in pieces, Frozen Mechanically Deboned Meat	12 205 843	R 91 321 291	R 7.48
0207.1220	Carcasses (excluding necks and offal) with all cuts (e.g. thighs, wings, legs and breasts) removed	120 000	R 221 433	R 1.85
0207.1290	Chicken: Not cut in pieces, frozen, whole and half chickens	270 600	R 4 494 255	R 16.61
0207.1411	Chicken: Boneless cuts: Breasts	783 456	R 19 013 961	R 24.27
0207.1415	Chicken: Boneless cuts: Other	25 715	R 475 907	R 18.51
0207.1421	Chicken: Offal: Livers	331 844	R 1 982 315	R 5.97
0207.1423	Chicken: Offal: Feet	690 726	R 8 174 141	R 11.83
0207.1429	Chicken: Offal: Other	567 145	R 2 269 181	R 4.00
0207.1493	Chicken: Other: Leg quarters	4 927 580	R 67 899 505	R 13.78
0207.1495	Chicken: Other: Wings	134 985	R 2 116 038	R 15.68
0207.1498	Chicken: Other: Drumsticks	466 968	R 8 134 736	R 17.42
0207.1499	Chicken: Other: Other	395 974	R 2 315 195	R 5.85
0207.2500	Turkey: Not cut in pieces, frozen; Whole frozen turkey	50 350	R 1 478 506	R 29.36
0207.2700	Turkey: Cuts and offal, frozen; Frozen Turkey portions and MRM	573 849	R 11 311 708	R 19.71
0207.4200	Ducks, Not cut in pieces, frozen	26 994	R 1 050 136	R 38.90
1602.3290	Chicken: Flavoured, herbed or marinated	64 612	R 1 005 858	R 15.57
Total for:	Brazil in December 2018	21 636 641	R 223 264 166	R 10.32

Brazilian imports in December 2018 included 56.4 % mechanically deboned meat; 7.9 % chicken offal and carcasses; 22.8 % frozen chicken bone-in leg quarters; 2.2 % frozen chicken drumsticks; 2.5 % other frozen chicken portions (wings, other); 3.7 % frozen boneless chicken portions; 1.3 % whole frozen chickens and 2.9 % turkey meat. Imports included a small quantity of duck products and value-added chicken. In December 2016, Brazilian imports comprised just 2.9 % bone-in chicken portions. In December 2018, this figure is 27.4 % (from a high of 46.5 % in February 2018).

Graph 5 shows the monthly imports (t) from Brazil, since December 2014:

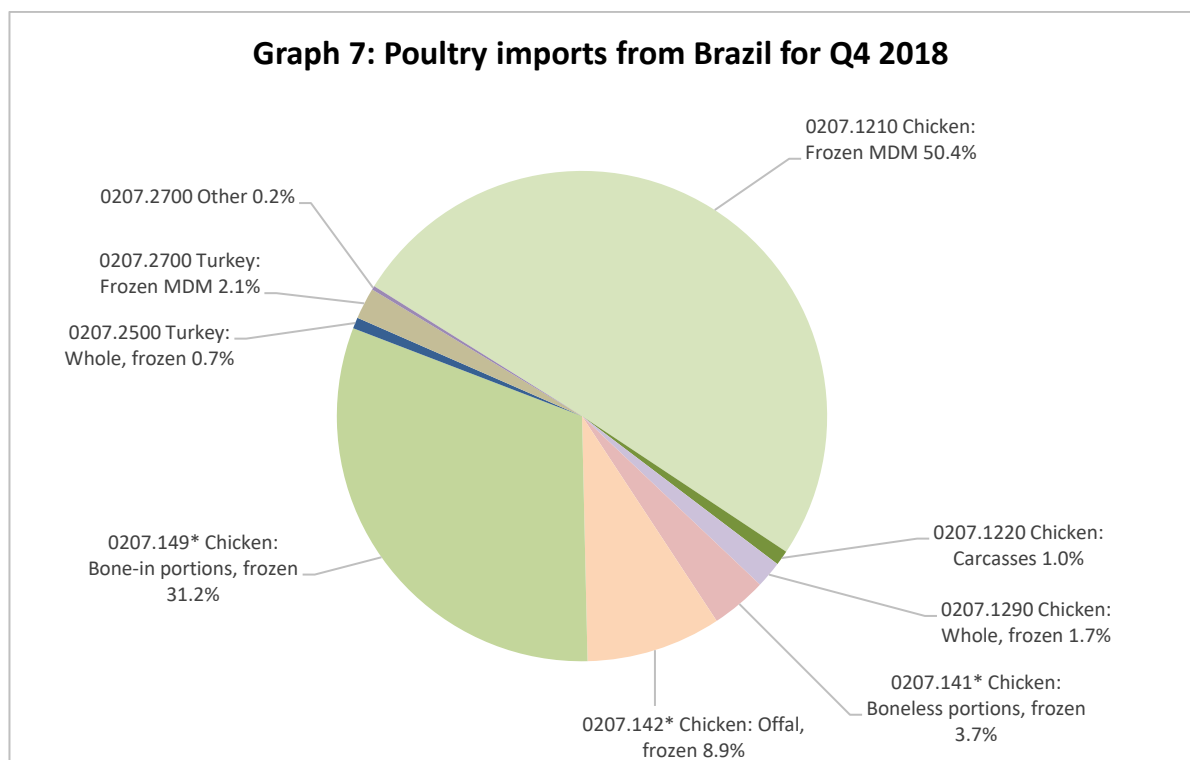


Accumulated imports in December 2017 (337 476 t) were 3.2 % higher than in December 2016 (Graph 6). Brazilian imports (348 155 t) in 2018 are 5.8 % higher than in the same period in 2017.



Quarterly poultry imports from Brazil:

Mechanically deboned meat (0207.1210) made up 50.4 % (38 186 t) of all imports originating from Brazil during the 4Q 2018 (total: 75 704 t). During 4Q 2018, the remainder of Brazilian imports included 8.9 % frozen offal (0207.142*); 31.2 % bone-in chicken portions (23 618 tonnes; 0207.149*); 2.1 % frozen turkey portions and MDM (0207.2700); 3.7 % frozen boneless chicken portions (0207.141*); 1.0 % frozen chicken carcasses; 1.7 % whole frozen chicken (0207.1290) and 0.2 % other (Graph 7).

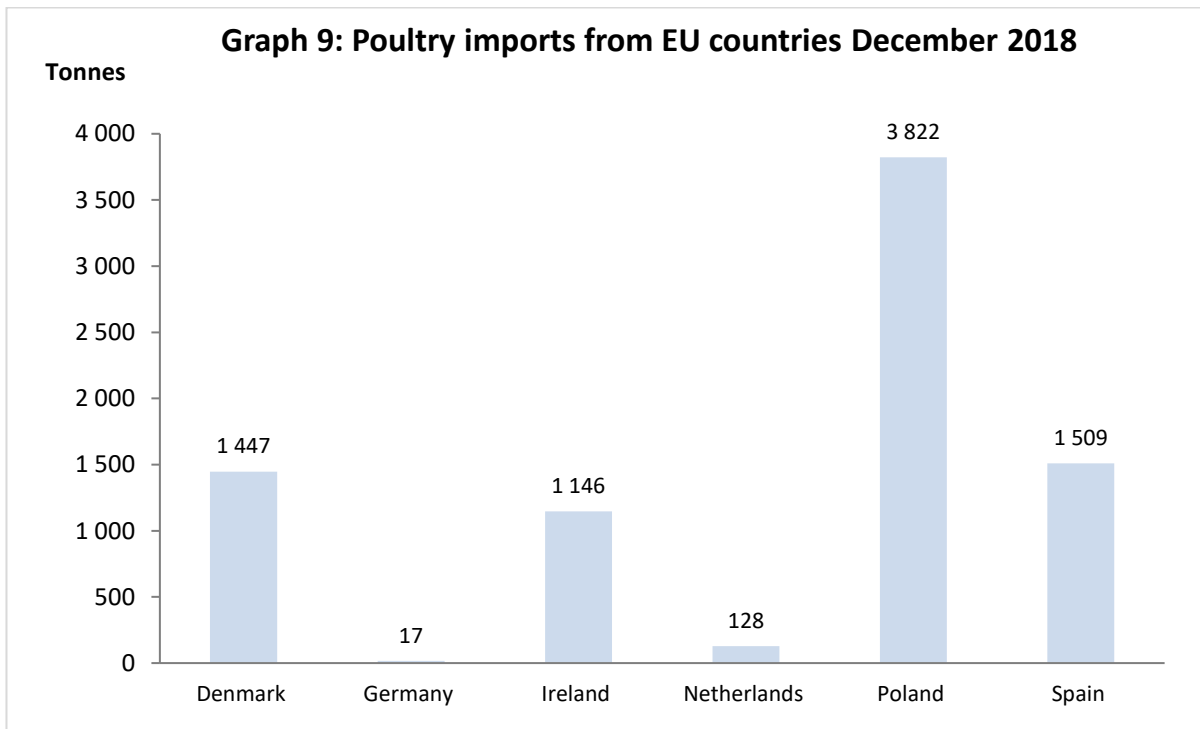
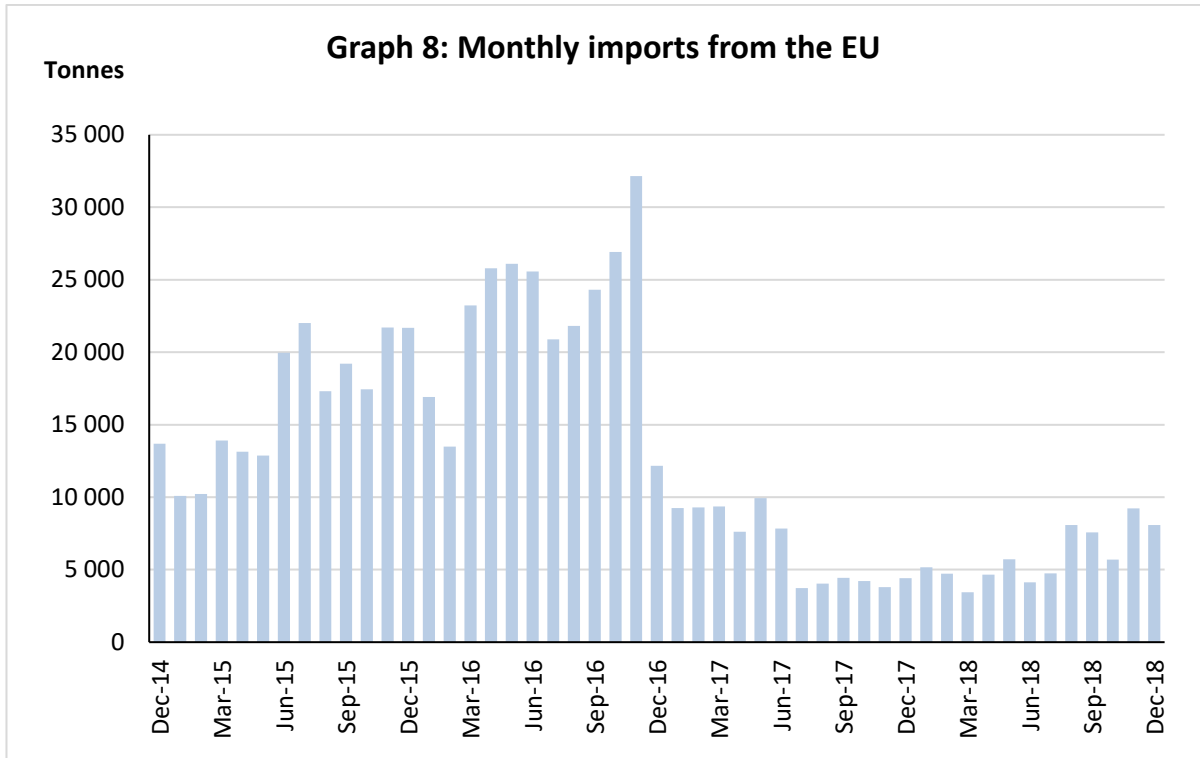


3.2 Poultry imports from the EU

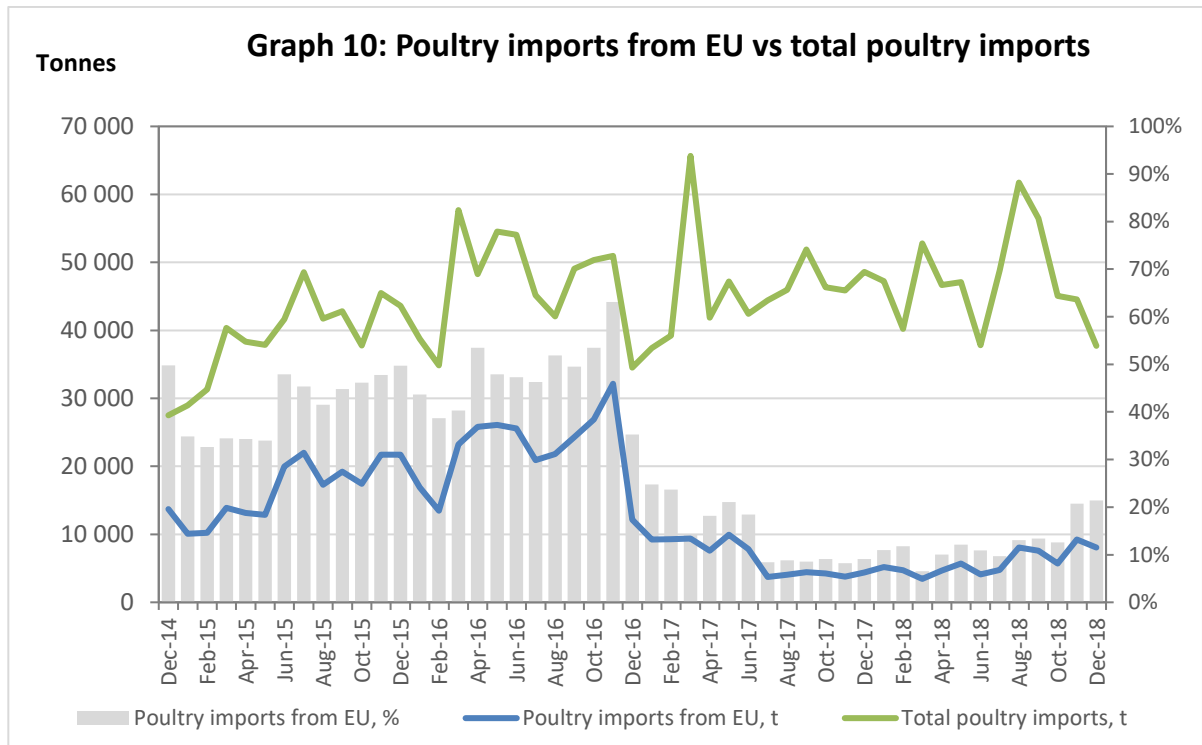
Graph 8 depicts the total monthly poultry imports from the European Union from December 2014 to December 2018. During December 2018, 8 070 t of poultry imports entered the country from the EU; this is 12.6 % less than in November (- 1 162 t).

EU imports represent 21.4 % of total poultry imports in December. Imports from individual EU countries, with notable tonnages, are shown in Graph 9. Six EU nations sent product in excess of 1 tonne to South Africa in December.

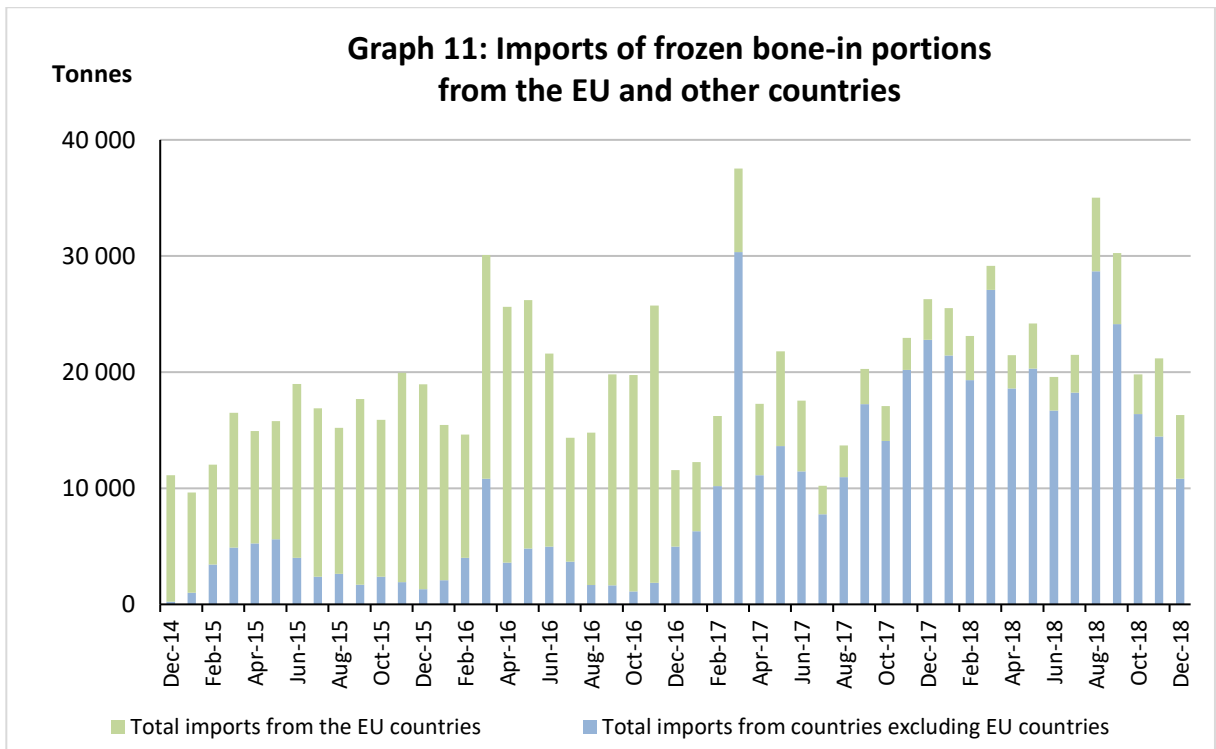
The contribution of the EU to total poultry imports reached 60 % in November 2014 (Graph 10) before the HPAI outbreaks of 2015. EU tonnages rose strongly again through 2016 as the bloc recovered from the epidemic, hitting 63 % of total imports in November 2016. Imports dropped dramatically from December 2016 in response to new AI-related trade bans.



December 2018 imports from the EU are up 83.1 % (+ 3 661 t) on December 2017 imports but remain 74.9 % below the record EU imports received in November 2016.



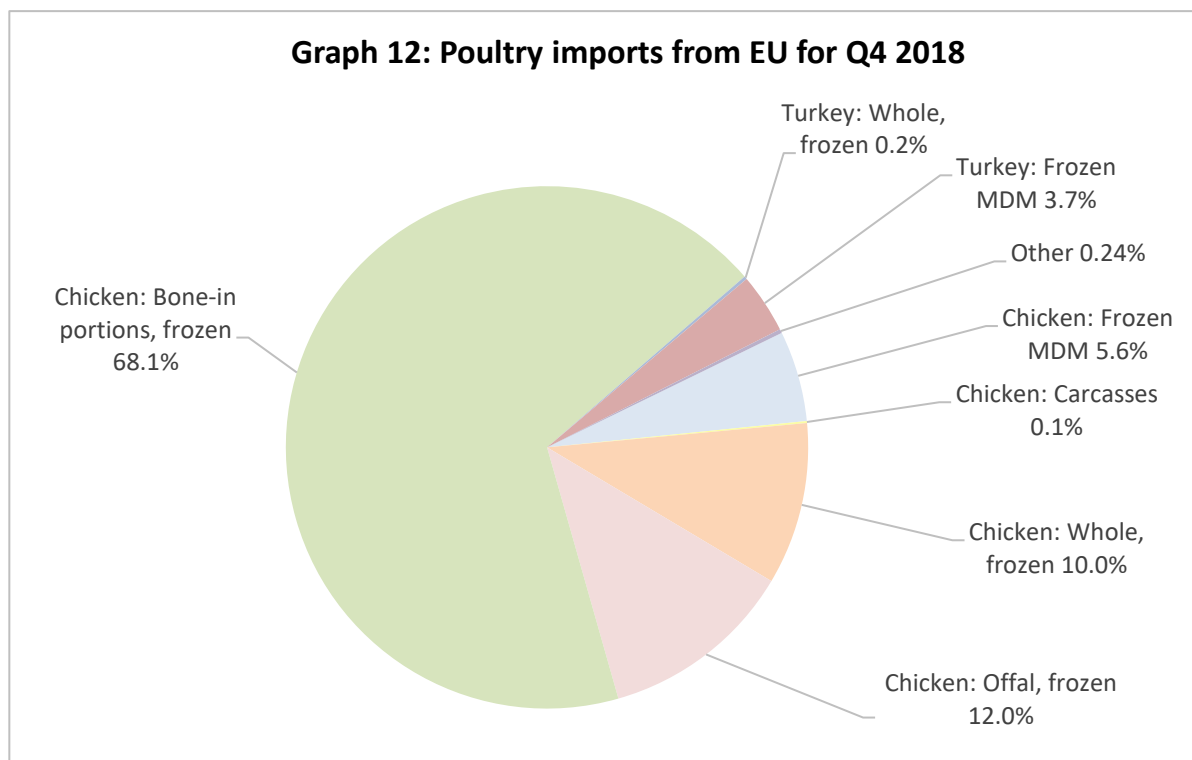
The contribution of frozen bone-in portions imports originating from the EU had been increasing steadily, relative to imports from other countries (Graph 11) but, with AI-related trade bans applied since late 2016, the EU proportion decreased from > 90 % to average 18.3 % in 2018.



Quarterly poultry imports from EU:

Frozen bone-in chicken portions (0207.149*) made up 68.1 % (15 646 t) of all imports originating from the EU during the 4Q 2018 (total: 22 987 t; Graph 12). During the fourth quarter of 2018,

the remainder of EU imports comprised 12.0 % frozen offal (0207.142*); 10.0 % whole frozen chickens (0207.1290); 0.1 % frozen chicken carcasses (0207.1220); 3.7 % frozen turkey cuts and offal (0207.2700); 5.6 % frozen chicken MDM (0207.1210); 0.2 % whole frozen turkeys (0207.2400) and 0.24 % of products imported on other tariff lines.



3.2.1 Poultry imports from Netherlands for December 2018:

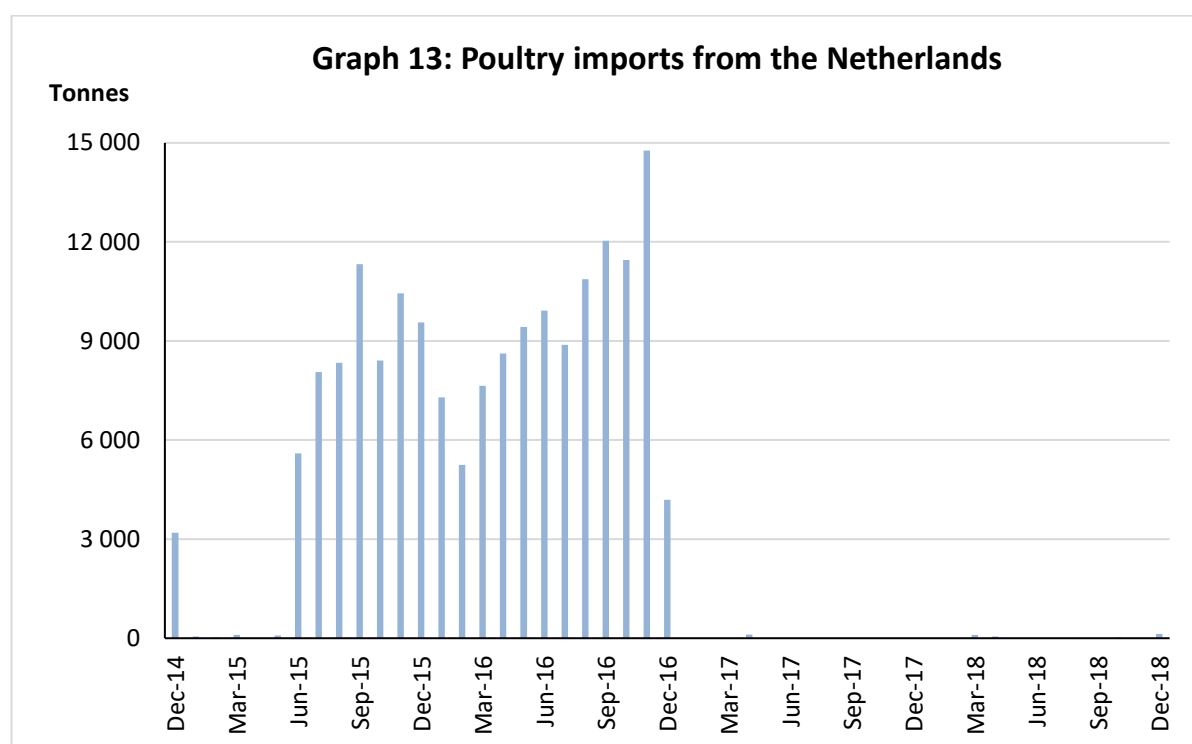
Dutch poultry imports reached a peak in November 2016 (14 769 t; see Graph 13). From November 2016, the Netherlands culled over 210 000 birds in two HPAI events. In December 2017, a third event totalling 68 cases in wild birds was reported to the OIE. A final report on this event was submitted on 5 April 2018. In a fourth event, also beginning in December 2017, an outbreak of H5N6 HPAI in a duck farm to the east of Amsterdam (Flevoland) was reported. This outbreak resulted in the culling of 16 000 fattening ducks. This case was also declared resolved on 5 April 2018. On 24 February 2018, the Dutch reported H5N6 HPAI in a farm in the province of Groningen in the north of the country. Almost 38 000 birds were culled. A second outbreak was added to this event on 12 March in the Overijssel region. In this outbreak, almost 29 000 birds were culled. A final report on this event, declaring it resolved, was submitted to the OIE on 10 July 2018. The Dutch reported H5N6 in a wild mallard duck in Noord-Holland in late August, in a new declaration. This event was declared closed on 28 September 2018.

The Dutch made a return to the South African poultry market in March 2018 (105 t) and in April 54 tonnes arrived from the Netherlands. No imports were received in May, June or July 2018. In August, 10.5 tonnes of duck products were imported and in October, 25.2 tonnes of chicken livers (offal) arrived from the Netherlands. No Dutch imports were received in November but, in December 2018, 128 tonnes of mechanically deboned chicken were received (Graph 13), at an FOB value of R0.91 million.

Poultry imports from the Netherlands for December 2018:

Tariff	Description	Import Quantity in kg	FOB Import Price in R	Unit Price in R per kg
0207.1210	Chicken: Not cut in pieces, Frozen Mechanically Deboned Meat	127 620	R 910 537	R 7.13
Total for:	Netherlands in December 2018	127 620	R 910 537	R 7.13

Poultry imports from the Netherlands totalled 110 344 t in 2016, an increase of 48 349 t (+ 78 %) in comparison with 2015 (61 995 t). Dutch imports totalled 122 tonnes in 2017 and imports reached 323 t in 2018.



3.2.2 Poultry imports from the UK for December 2018:

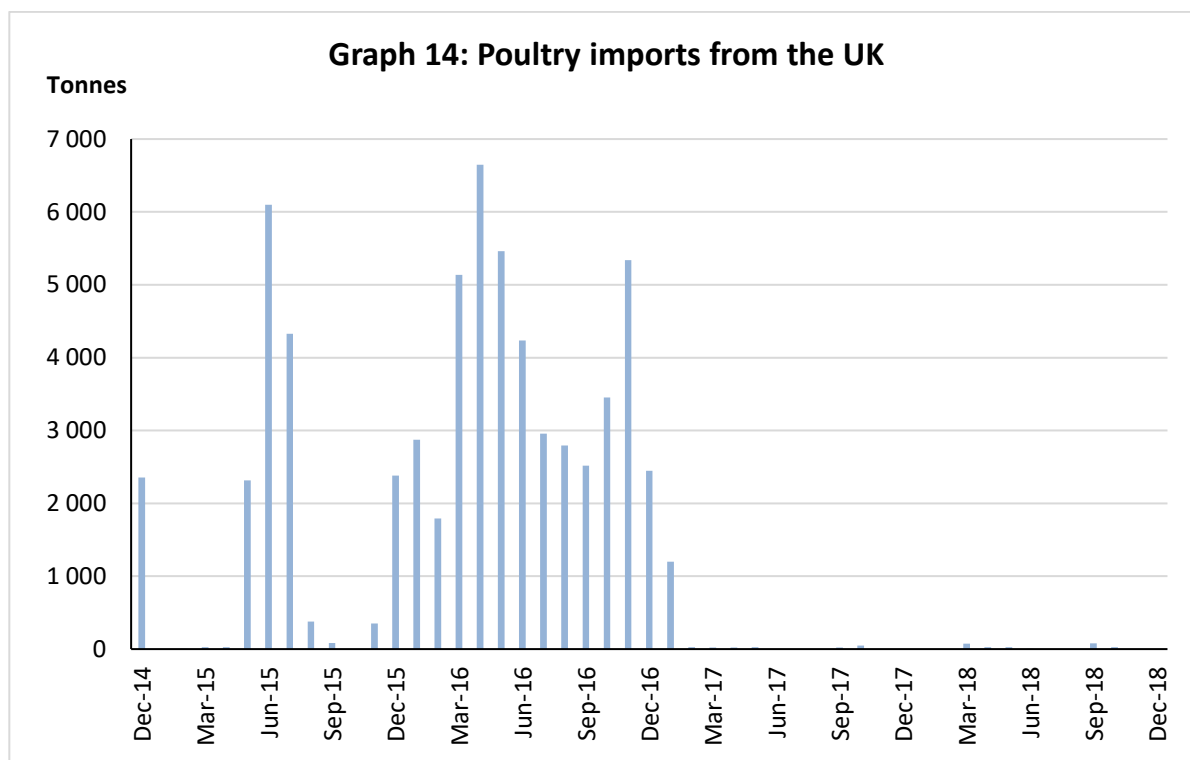
Since 11 December 2016, the UK has been dealing with regular outbreaks of H5N8 HPAI. To March 2017, the UK reported 27 outbreaks, consisting of 5 880 cases in commercial birds and 178 in wild birds. A final report on this event was submitted to the OIE on 9 March 2017. However, a separate report was submitted on 3 March 2017 confirming H5N8 HPAI in a wild European wigeon in Pembrokeshire in Wales.

In May 2017, the UK experienced new outbreaks of H5N8 in Lancashire. In early June 2017, H5N8 HPAI was recorded in a backyard flock in Diss, Norfolk. In late July 2017, the UK reported H5N8 in a mute swan on the Norfolk Broads. Final reports on these events were issued to the OIE on 13 September 2017.

From 9 January 2018, the UK reported 20 outbreaks, totalling 85 cases in wild birds across the country. No further outbreaks were recorded after 28 March 2018 and a final report on this event, declaring it resolved, was submitted to the OIE on 5 April 2018. On 15 June, the UK opened a new report with the OIE after H5N6 avian influenza was reported in a greylag goose in Northern Ireland. The UK considers this event resolved.

The British made a return to the South African poultry market in March 2018 but tonnages have been low and sporadic. In December, no poultry imports were received from the UK.

Poultry imports from the UK totalled 45 657 t in 2016, an increase of 186 % over 2015 levels (15 985 t). In 2017, imports from the UK amounted to 1 366 tonnes. In 2018, 231 t of poultry products have arrived from the UK.



3.2.3 Poultry imports from Germany for December 2018:

Low and erratic levels of imports have been recorded from Germany over the last three years as a result of temporary bans on imports because of avian influenza in the 4Q 2014, 3Q 2015, 4Q 2016 and 1H 2017. To 26 May 2017, Germany notified the OIE of 286 outbreaks of H5N8 HPAI in wild birds and commercial poultry; with the last confirmed outbreak on 9 May 2017. More than 1.15 million birds were destroyed as part of control measures. Germany also reported three outbreaks (2 350 cases) of H5N5 HPAI in breeding and fattening turkeys in January 2017. Final reports on all these outbreaks were submitted to the OIE on 11 August 2017.

However, on 29 August 2017, a new notification was made by the Germans to the OIE, reporting H5N8 HPAI in three wild swans in Sachsen-Anhalt in the centre of the country. A final report on this event was issued on 4 October 2017. In October 2017, the Germans declared another event resolved (23 October 2017) in the north-west region of Nieder-Sachsen, on the Dutch border.

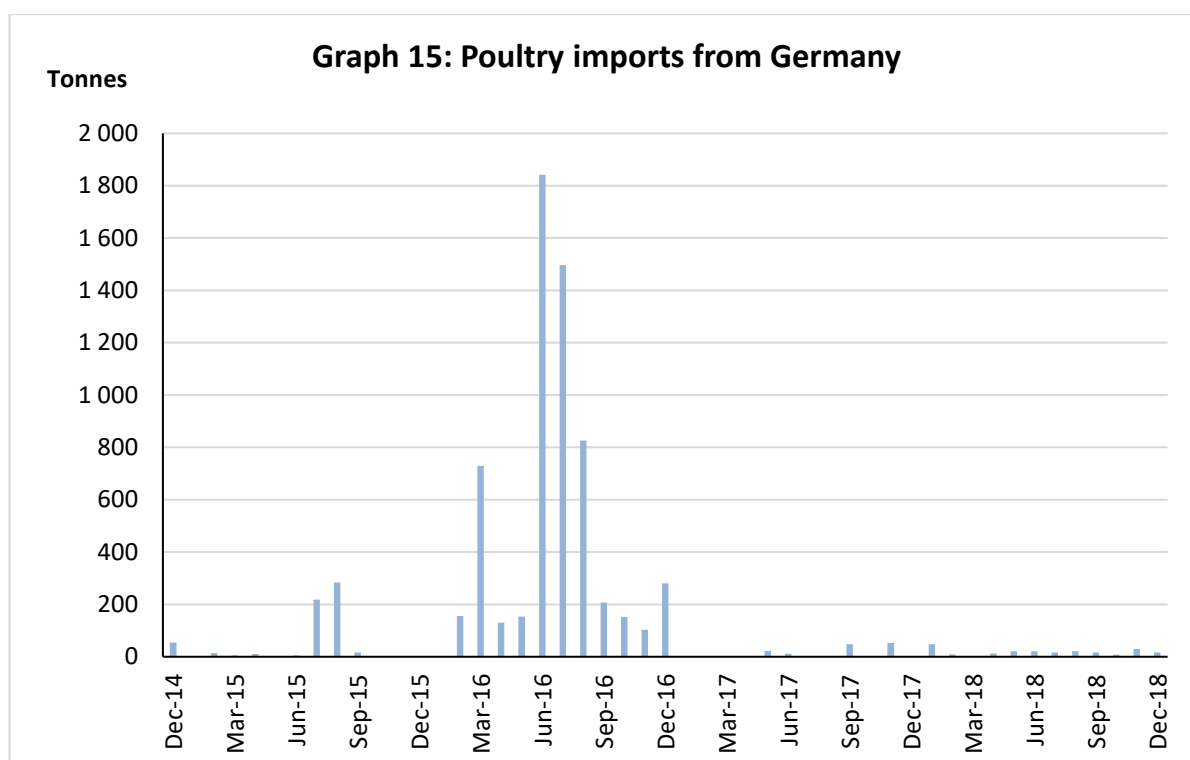
On 4 January 2018, the Germans reported a single case of H5N6 HPAI in a wild duck near Bayern. A final report was submitted to the OIE on 2 February 2018. On 20 March 2018, H5N6 was reported in a backyard flock of rare and endangered fowl, in the northerly Schleswig-Holstein region. This report was updated to include a case in a white stork, found in Niedersachsen on 28 April 2018, and a Eurasian buzzard in a forest in the Nordrhein-Westfalen region on 5 April 2018. A final report on this event, declaring it resolved, was submitted to the OIE on 1 June 2018.

On 31 August 2018, a new event was reported in a backyard flock in the Mecklenburg-Vorpommer region. The flock comprises rare and endangered breeds of chickens, geese and ducks. This event was declared closed on 2 October 2018.

In December 2018, 16.6 tonnes of value-added chicken were received from Germany (Graph 15); at an FOB value of R1.2 million.

Poultry imports from Germany for December 2018:

Tariff	Description	Import Quantity in kg	FOB Import Price in R	Unit Price in R per kg
1602.3290	Chicken: Flavoured, herbed or marinated	16 560	R 1 214 444	R 73.34
Total for:	Germany in December 2018	16 560	R 1 214 444	R 73.34



Poultry imports from Germany were restricted to 554 t in 2015; rose to 6 073 t in 2016; and crashed again to 134 t in 2017. In 2018, 222 t of poultry products arrived from Germany.

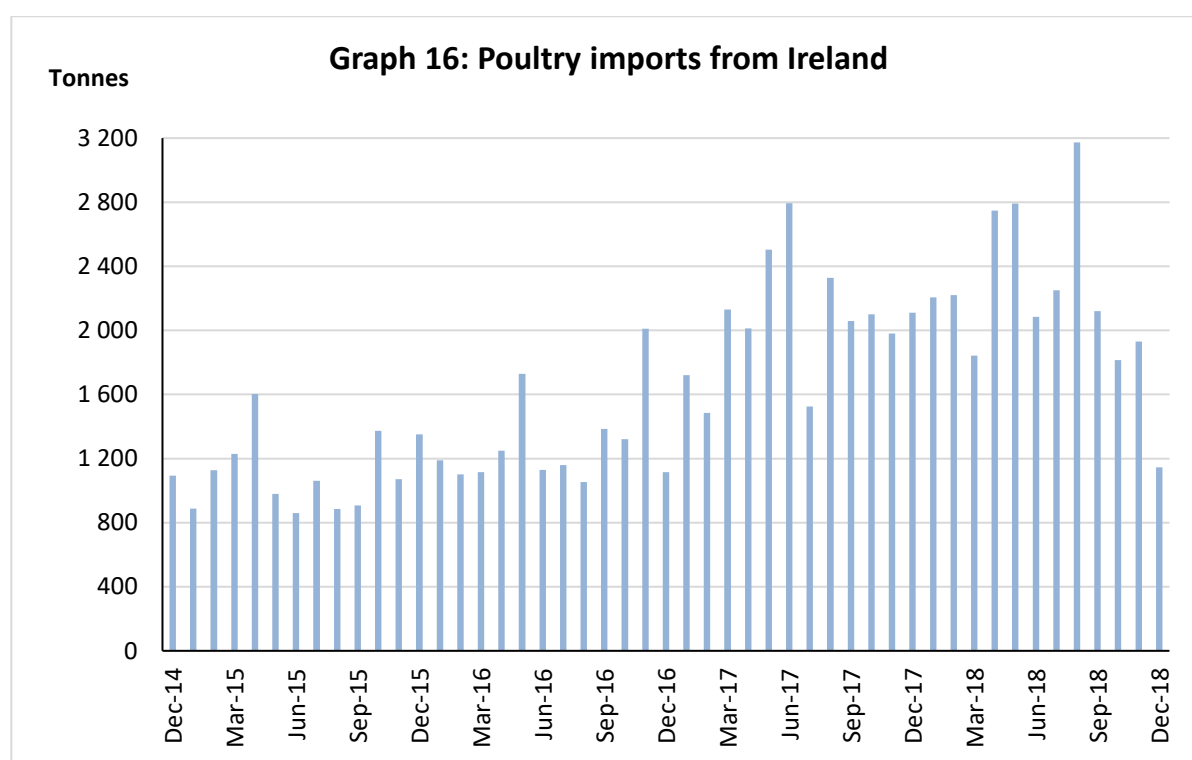
3.2.4 Poultry imports from Ireland for December 2018:

In December 2018, 1 146 t of poultry meat were imported from Ireland at an FOB value of R 14.2 m (Graph 16). Irish imports accounted for 3.0 % of total imports into South Africa in December; a decrease of 40.6 % (- 784 t) on a monthly basis and a decrease of 45.7 % (- 965 t) on December 2017 imports.

Of the Irish imports, 36.6 % were chicken leg quarters; 28.6 % chicken offal (livers, feet and other); 17.5 % whole frozen chicken; and 17.4 % other bone-in portions (wings, thighs, drumsticks).

Poultry imports from Ireland for December 2018:

Tariff	Description	Import Quantity in kg	FOB Import Price in R	Unit Price in R per kg
0207.1290	Chicken: Not cut in pieces, frozen, whole and half chickens	200 000	R 3 090 034	R 15.45
0207.1421	Chicken: Offal: Livers	25 000	R 139 545	R 5.58
0207.1423	Chicken: Offal: Feet	126 000	R 1 573 384	R 12.49
0207.1429	Chicken: Offal: Other	176 200	R 1 402 724	R 7.96
0207.1493	Chicken: Other: Leg quarters	418 760	R 5 595 891	R 13.36
0207.1495	Chicken: Other: Wings	65 100	R 881 183	R 13.54
0207.1497	Chicken: Other: Thighs	121 957	R 1 378 465	R 11.30
0207.1498	Chicken: Other: Drumsticks	12 600	R 179 279	R 14.23
Total for:	Ireland in December 2018	1 145 617	R 14 240 505	R 12.43



In 2017, Ireland exported 24 746 t of poultry products to South Africa, compared to 15 556 t during 2016; an increase of 59.1 %. Irish imports in 2018 (26 328 t) are 6.4 % higher than in 2017.

3.2.5 Poultry imports from France for December 2018:

In December 2018, only 414 *kilogrammes* of poultry meat (pâté de fois gras; chicken pastes and duck products) were imported from France, at an FOB value of R145 094.

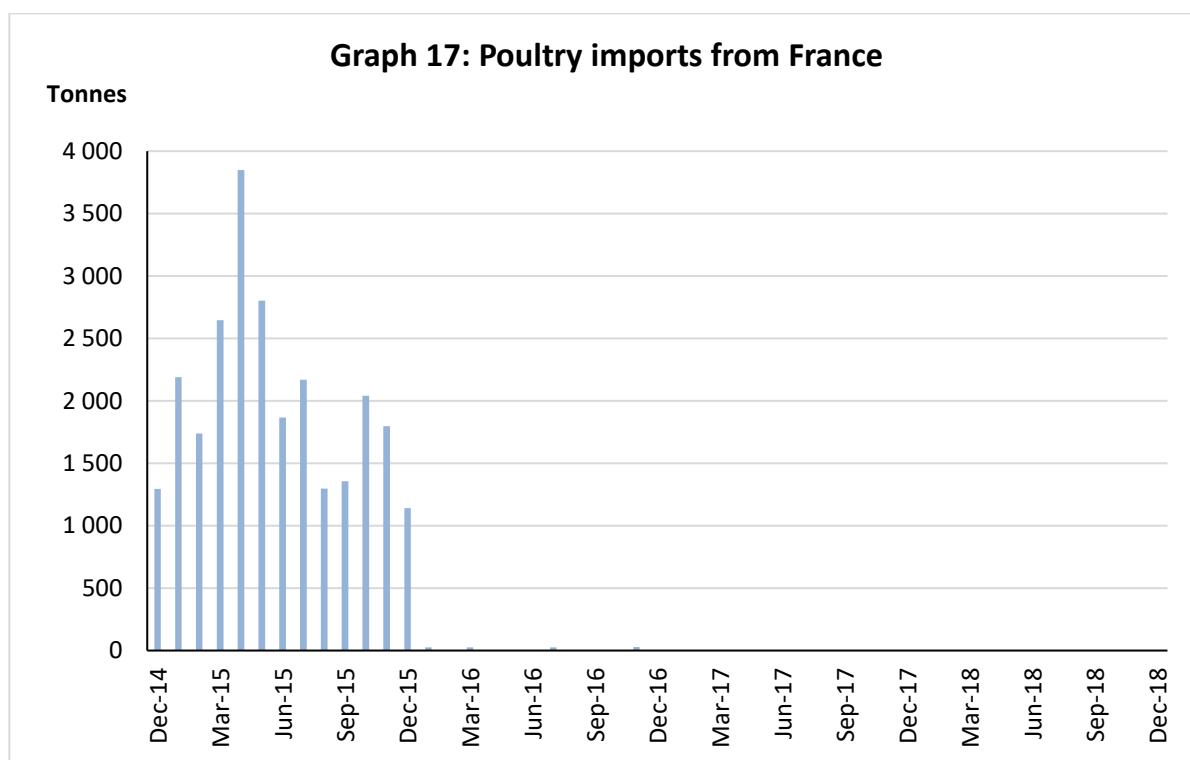
Between December 2015 and August 2016, 81 separate outbreaks of the Eurasian H5N1, H5N2 and H5N9 strains (three events) were reported in the south west of France, resulting in the destruction of over 280 000 birds. The French were due to regain HPAI-free status in December 2016 but, on 17 November 2016, a fourth HPAI event was reported to the OIE. This event expanded to 55 outbreaks in all four corners of the country. This event was declared closed through the OIE on 18 October 2017.

In a fifth event, beginning November 2016, the French reported a further 485 outbreaks of H5N8 HPAI, totalling 15 900 cases, which resulted in the culling of over 1.29 million birds (OIE). The last positive outbreak was reported was on 26 June 2017. Local producers estimate that some 3.2 million birds were lost to the disease or in the pre-emptive culls. This event was also declared resolved with the OIE on the 18 October 2017.

In 2016, France exported only 105.4 t of poultry products to South Africa, compared to 24 985 t during 2015; a decrease of 99.6 %. Accumulated imports into France in 2017 and 2018 totalled 3.9 and 4.85 tonnes, respectively.

Poultry imports from France for December 2018:

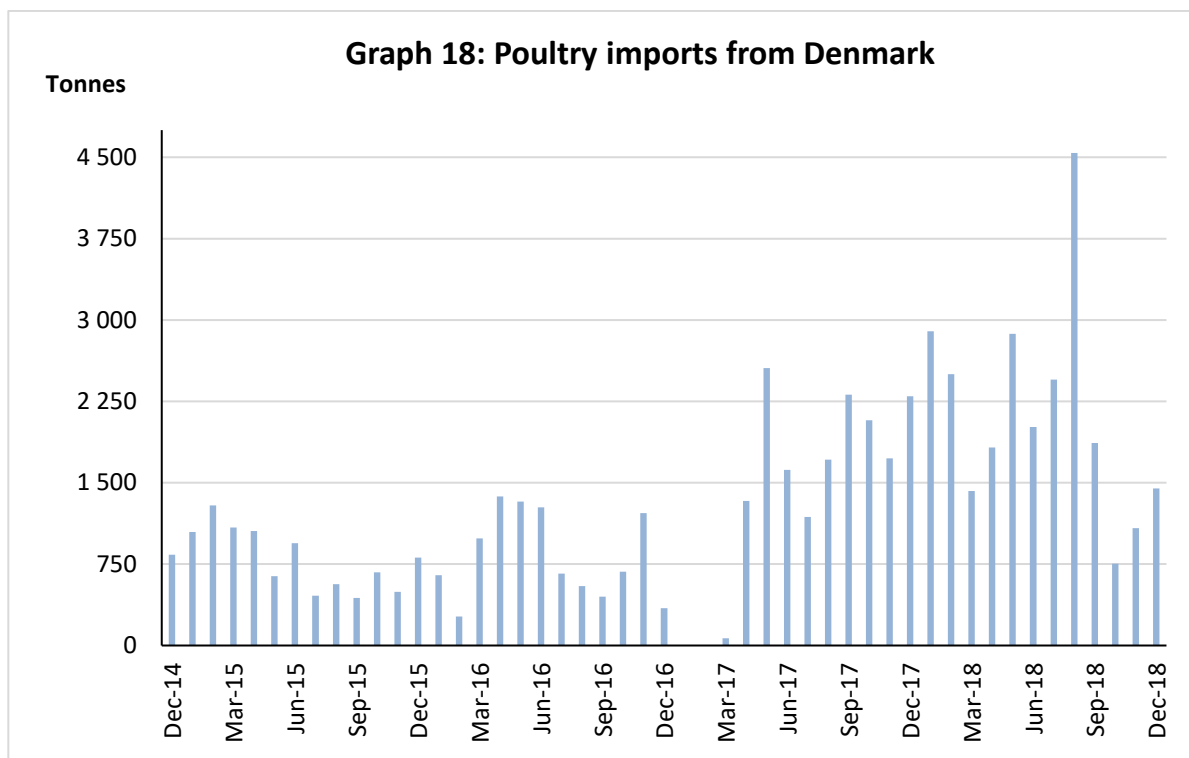
<i>Tariff</i>	<i>Description</i>	<i>Import Quantity in kg</i>	<i>FOB Import Price in R</i>	<i>Unit Price in R per kg</i>
1602.2010	Pate de foie gras, goose liver paste	403	R 140 923	R 349.68
1602.3210	Chicken: Pastes	2	R 916	R 458.00
1602.3910	Ducks, geese or guinea fowl: Pastes	4	R 1 545	R 386.25
1602.3990	Ducks, geese or guinea fowl: Other, Not including pastes	5	R 1 710	R 342.00
Total for:	France in December 2018	414	R 145 094	R 350.47



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3.2.6 Poultry imports from Denmark for December 2018:

In December 2018, 1 447 t of poultry meat were imported from Denmark at an FOB value of R19.2 million. This is 364 t more (+ 33.6 %) than the tonnes imported in November but 37.0 % (- 850 t) less than December 2017. Denmark accounted for 3.8 % of total poultry imports in December 2018.



Poultry imports from Denmark for December 2018:

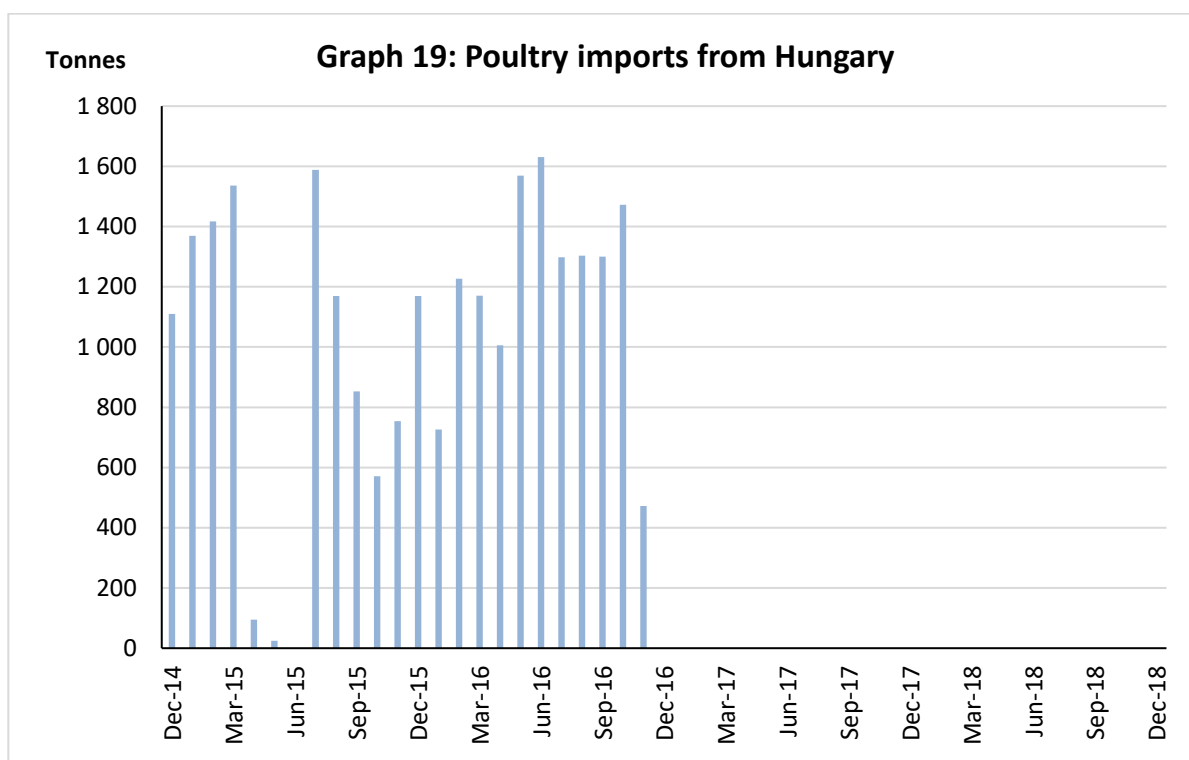
Tariff	Description	Import Quantity in kg	FOB Import Price in R	Unit Price in R per kg
0207.1210	Chicken: Not cut in pieces, Frozen Mechanically Deboned Meat	108 004	R 755 967	R 7.00
0207.1220	Carcasses (excluding necks and offal) with all cuts (e.g. thighs, wings, legs and breasts) removed	27 000	R 248 913	R 9.22
0207.1290	Chicken: Not cut in pieces, frozen, whole and half chickens	26 010	R 404 423	R 15.55
0207.1423	Chicken: Offal: Feet	27 000	R 373 520	R 13.83
0207.1429	Chicken: Offal: Other	81 000	R 743 350	R 9.18
0207.1491	Chicken: Other: Whole bird cut in half	25 740	R 340 550	R 13.23
0207.1493	Chicken: Other: Leg quarters	745 146	R 10 476 936	R 14.06
0207.1495	Chicken: Other: Wings	147 000	R 2 497 609	R 16.99
0207.1497	Chicken: Other: Thighs	195 528	R 2 654 526	R 13.58
0207.1499	Chicken: Other: Other	65 000	R 752 981	R 11.58
Total for:	Denmark in December 2018	1 447 428	R 19 248 775	R 13.30

Of the Danish imports in December 51.5 % were frozen chicken leg quarters; 13.5 % chicken thighs; 10.2 % chicken wings; 4.5 % “other” chicken bone-in portions; 7.5 % chicken offal (feet and “other”); 1.8 % whole frozen chickens; 1.8 % frozen half chickens; 1.9 % frozen chicken carcasses and 7.5 % mechanically deboned chicken.

In 2018, Denmark reported 24 outbreaks of H5N8 HPAI in white-tailed eagles, Eurasian buzzards, gulls, cormorant, crows and mute swans. The last reported case was on 15 April 2018. A final report on this event was submitted to the OIE on 22 June. The Danes have more recently reported new cases of H5N6 in eider ducks and mute swans in the east of the country (follow-up report submitted 11 September 2018).

Imports from Denmark in 2017 totalled 16 884 t; 72.7 % more than in 2016. Danish imports in 2018 (25 672 t) are 52.0 % higher than in 2017.

3.2.7 Poultry imports from Hungary for December 2018:



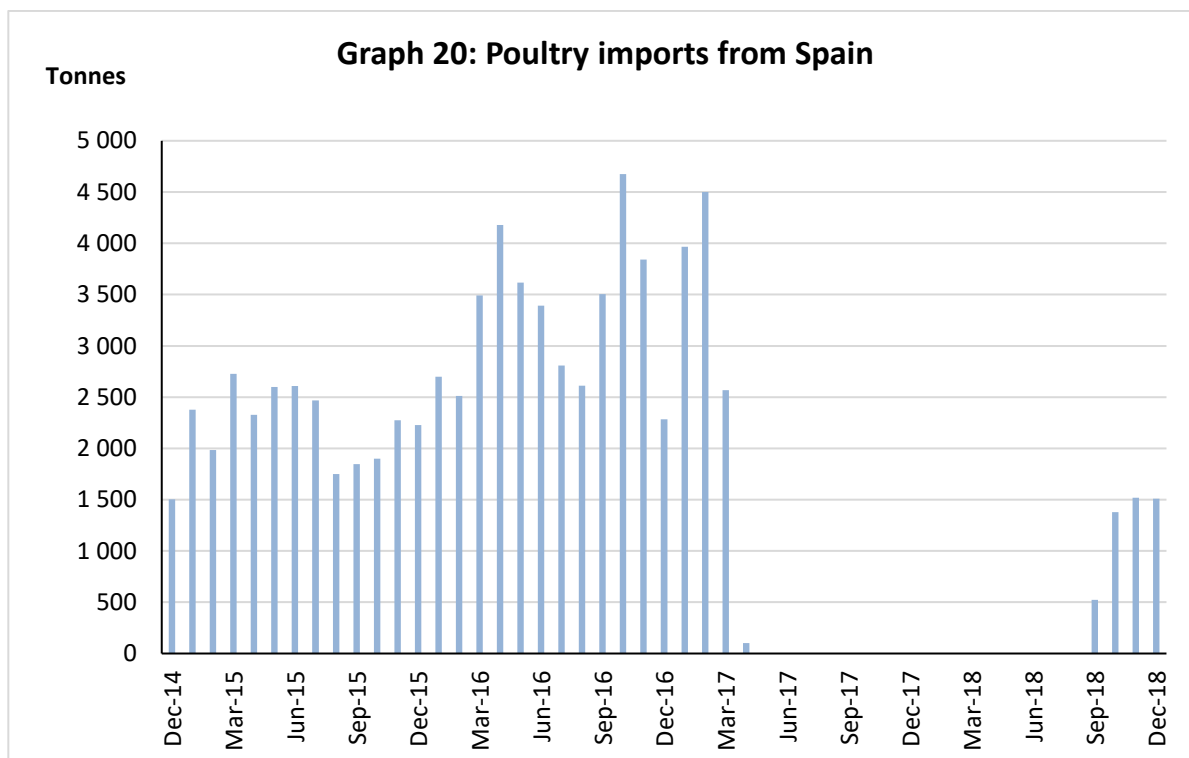
No poultry meat was imported from Hungary in December 2018 (Graph 19). In 2016, Hungary exported 13 174 t of poultry products to South Africa. Nothing was imported through 2017 or in 2018.

Hungary experienced a single avian influenza event in late March 2015, which was declared resolved in an OIE report issued on the 8 April 2015. However, from 1 December 2016, Hungary reported 294 outbreaks (206 045 cases) of H5N8 HPAI in poultry operations housing fattening turkeys, geese and ducks. Only 135 of the cases were in wild birds. There were almost 96 000 deaths amongst the birds and almost 2 million birds were culled. The last case reported to the OIE was dated 18 April 2017 and a final report was submitted on 16 June 2017.

3.2.8 Poultry imports from Spain for December 2018:

On 3 January 2017, Spain reported a single case of H5N8 HPAI in a wild greylag goose to the OIE; found in the central north of the country. On 18 February, highly pathogenic H5N8 was found on a commercial duck farm in the province of Cataluna, resulting in a pre-emptive cull of 17 077 birds. This event increased to ten outbreaks, with 997 cases and nearly 27 000 birds culled. No further cases were reported after 18 February 2017 and the Spanish submitted a final report to the OIE on 30 May 2017, reclaiming the country's HPAI-free status with effect from 2 June 2017.

The Spanish returned to the South African market in September 2018. In December, 1 509 tonnes of poultry imports have been received from the Spanish, at an FOB value of R20.6 million. Imports decreased by 0.7 % (- 10 t) over November 2018 levels. Spanish imports accounted for 4.0 % of imports in December 2018.



Poultry imports from Spain for December 2018:

<i>Tariff</i>	<i>Description</i>	<i>Import Quantity in kg</i>	<i>FOB Import Price in R</i>	<i>Unit Price in R per kg</i>
0207.1290	Chicken: Not cut in pieces, frozen, whole and half chickens	276 280	R 4 434 506	R 16.05
0207.1423	Chicken: Offal: Feet	403 770	R 4 975 341	R 12.32
0207.1493	Chicken: Other: Leg quarters	237 550	R 3 264 786	R 13.74
0207.1495	Chicken: Other: Wings	291 590	R 3 548 321	R 12.17
0207.1498	Chicken: Other: Drumsticks	200 305	R 2 667 931	R 13.32
0207.2700	Turkey: Cuts and offal, frozen; Frozen Turkey portions and MRM	100 000	R 1 705 703	R 17.06
Total for:	Spain in December 2018	1 509 495	R 20 596 588	R 13.64

The Spanish imports comprised 15.7 % frozen chicken leg quarters; 19.4 % frozen chicken wings; 13.3 % frozen chicken drumsticks; 18.3 % whole frozen chickens; 26.7 % frozen chicken offal (feet) and 6.6 % turkey frozen turkey cuts and offal.

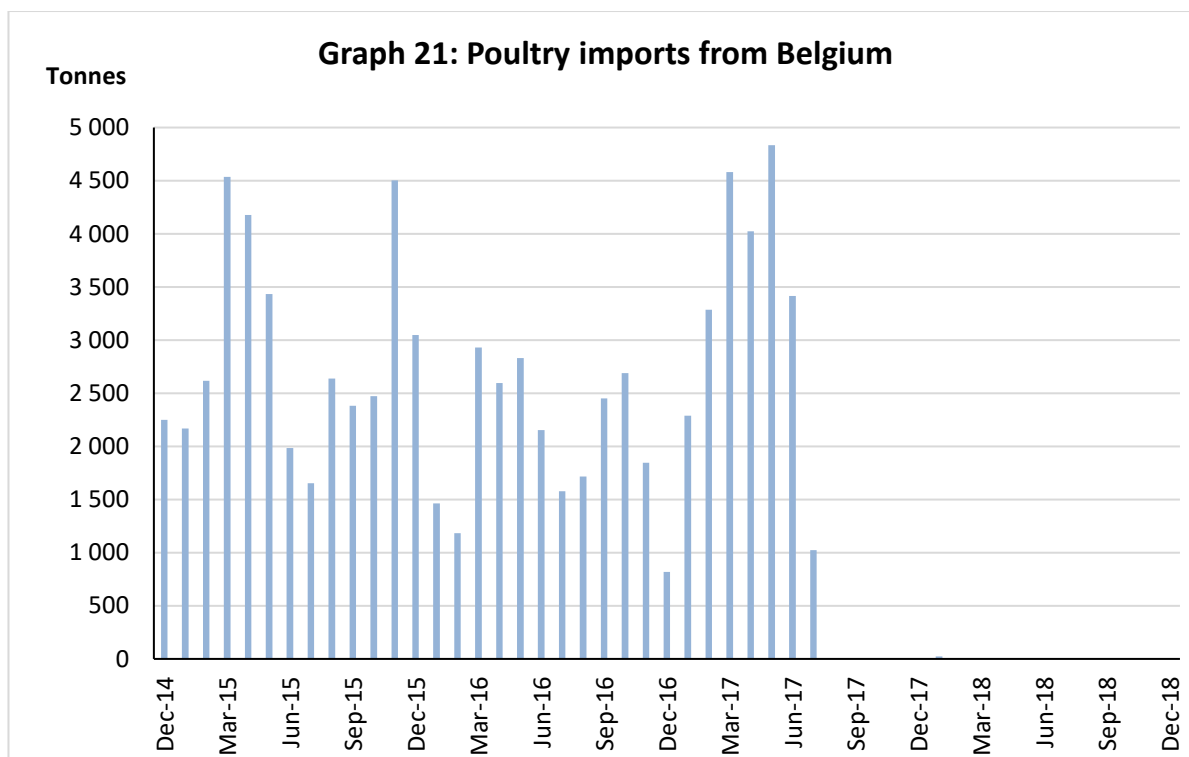
In 2016, Spain exported 39 620 t of poultry products to South Africa. Accumulated imports from Spain in 2017 totalled 11 138 t; 61 % less than in 2016. In 2018, 4 932 tonnes of poultry products have been imported from Spain, over 4 months.

3.2.9 Poultry imports from Belgium for December 2018:

From late January 2017, Belgium reported H5N8 HPAI in wild birds in the central provinces of the country and in Limburg province, neighbouring the Netherlands. Between 22 May and 7 July 2017, the country reported at least eleven outbreaks of HPAI in domestic poultry around the country. The last reported case was on 7 July and a final report was submitted on 24 July 2017.

These were the first HPAI events in domestic poultry in Belgium in seven years and the July 2017 to December 2018 crash in Belgian imports relates directly to these outbreaks. There were signs that the Belgians were returning to the market (340 *kilogrammes* in December 2017 and 23 *tonnes* in January 2018 (Graph 21; volume too small to be visible)), but no Belgian imports were recorded from February through December 2018.

In 2016, Belgium exported 24 256 t of poultry products to South Africa. Imports from Belgium in 2017 totalled 23 451 tonnes; 3.3 % down on 2016. Only 23 tonnes were imported in 2018.



3.2.10 Poultry imports from Poland for December 2018:

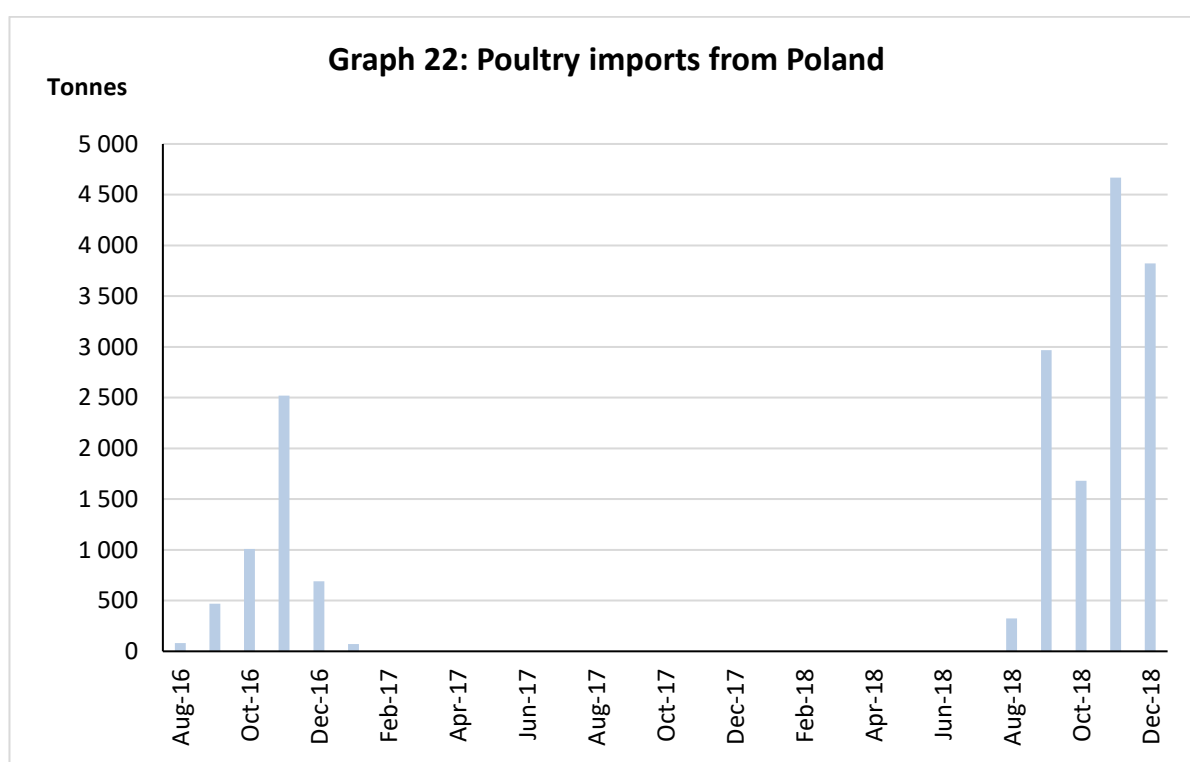
Poland first entered the South African poultry market in August 2016. On 7 December 2016, Polish veterinary authorities notified the OIE of H5N8 HPAI in wild birds (24 cases). Poland reported a total of 133 outbreaks of HPAI (56 227 cases) in wild birds, backyard flocks and commercial poultry. On 27 January 2017, Poland added 2 cases of H5N5 in wild swans, reported from the west of the country. Over 1 million birds were culled in response to the outbreak but the last outbreak was recorded on 15 March 2017 and Poland submitted a final report to the OIE on 20 April 2017. In 2016, 4 773 t of Polish poultry products were imported but Poland was excluded from the South African market from February 2017 through to July 2018.

In December 2018, 3 822 tonnes of poultry meat were received from Poland (Graph 22) at an FOB value of R52.4 million. This is nevertheless a decrease of 846 t on the levels imported in November 2018 (- 18.1 %). Poland accounted for 10.1 % of total poultry imports in December 2018. The Polish imports comprised 49.7 % frozen chicken leg quarters, 18.3 % frozen chicken wings; 9.8 % chicken drumsticks; 12.7 % mechanically deboned chicken; 5.6 % whole frozen chickens and 3.9 % frozen turkey cuts/offal.

In 2018, Polish imports reached 13 463 tonnes, over 5 months.

Poultry imports from Poland for December 2018:

<i>Tariff</i>	<i>Description</i>	<i>Import Quantity in kg</i>	<i>FOB Import Price in R</i>	<i>Unit Price in R per kg</i>
0207.1210	Chicken: Not cut in pieces, Frozen Mechanically Deboned Meat	486 000	R 2 924 899	R 6.02
0207.1290	Chicken: Not cut in pieces, frozen, whole and half chickens	215 000	R 3 406 640	R 15.84
0207.1493	Chicken: Other: Leg quarters	1 899 869	R 27 016 889	R 14.22
0207.1495	Chicken: Other: Wings	697 920	R 10 837 517	R 15.53
0207.1498	Chicken: Other: Drumsticks	373 660	R 5 542 691	R 14.83
0207.2700	Turkey: Cuts and offal, frozen; Frozen Turkey portions and MRM	149 960	R 2 621 613	R 17.48
Total for:	Poland in December 2018	3 822 409	R 52 350 249	R 13.70



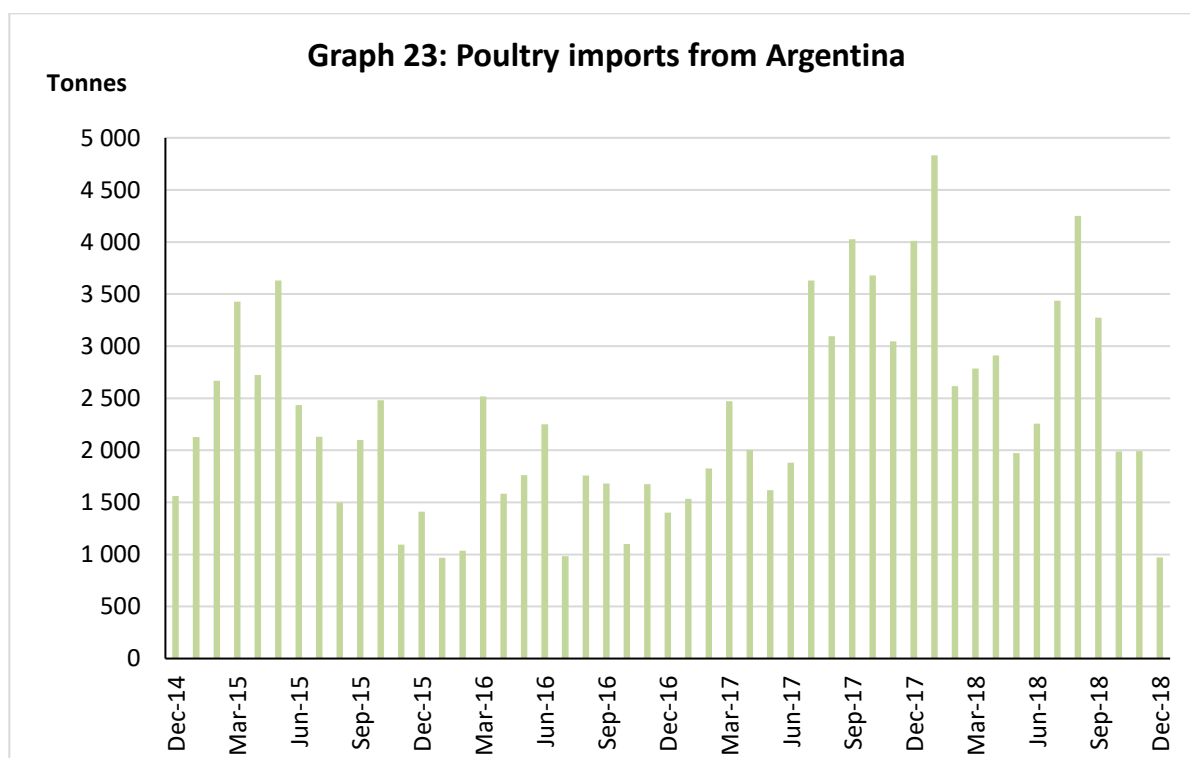
3.3 Poultry imports from Argentina for December 2018:

In December 2018, 971 t of poultry meat were imported from Argentina at an FOB value of R8.2 m (Graph 23). Imports decreased by 51.2 % (- 1 020 t) on a monthly basis and decreased by 75.8 % on a yearly basis (- 3 040 t). During this month, 2.6 % of total poultry imports came from Argentina; and 6.8 % of Argentinian imports were chicken carcasses; 25.9 % mechanically deboned chicken; 28.5 % frozen chicken offals (livers and “other”) and 38.7 % frozen chicken leg quarters.

In 2016, Argentina exported 18 713 t of poultry products to South Africa. Accumulated imports from Argentina totalled 32 816 t in 2017; 75.4 % up on 2016. Argentinian imports in 2018 (33 278 t) are 1.4 % up on imports in 2017.

Poultry imports from Argentina for December 2018:

Tariff	Description	Import Quantity in kg	FOB Import Price in R	Unit Price in R per kg
0207.1210	Chicken: Not cut in pieces, Frozen Mechanically Deboned Meat	251 900	R 1 820 204	R 7.23
0207.1220	Carcasses (excluding necks and offal) with all cuts (e.g. thighs, wings, legs and breasts) removed	65 985	R 308 150	R 4.67
0207.1421	Chicken: Offal: Livers	114 905	R 540 121	R 4.70
0207.1429	Chicken: Offal: Other	162 005	R 583 871	R 3.60
0207.1493	Chicken: Other: Leg quarters	376 015	R 4 964 306	R 13.20
Total for:	Argentina in December 2018	970 810	R 8 216 652	R 8.46



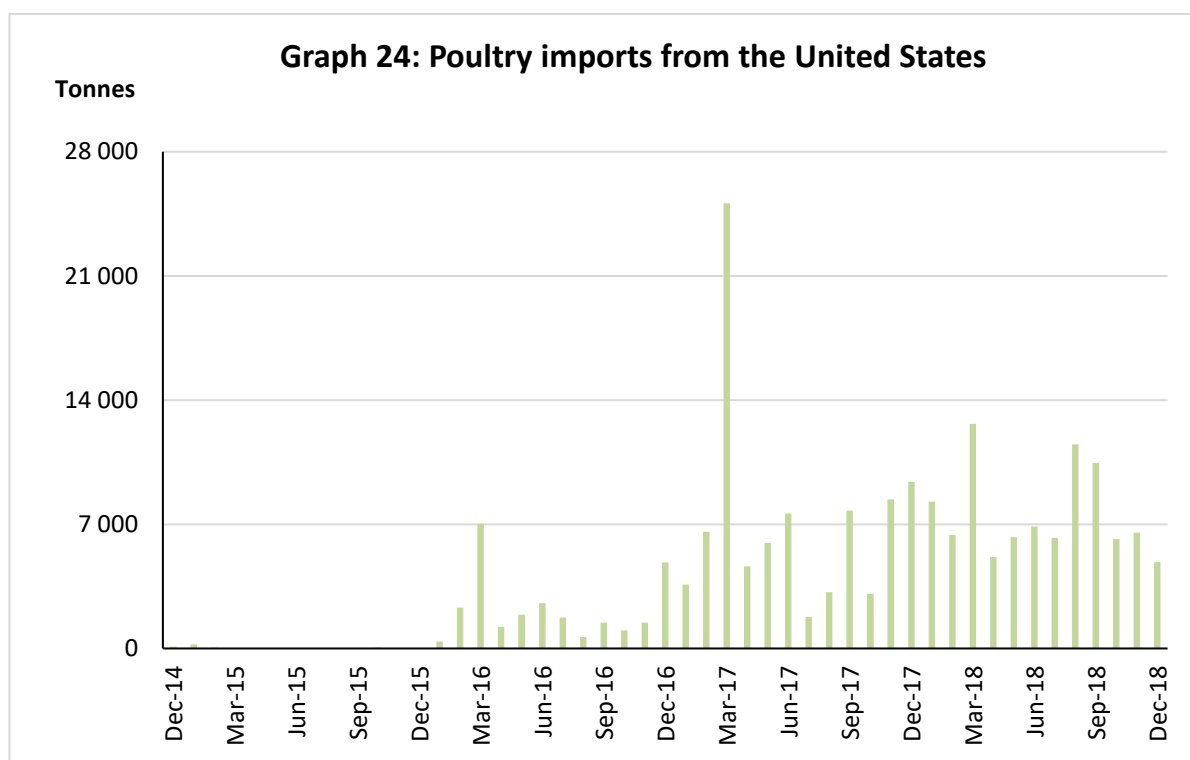
3.4 Poultry imports from the USA in December 2018:

Imports of frozen bone-in portions, until recently subject to anti-dumping duties, resumed from the USA in January 2016. Imports from the US totalled a staggering 25 103 t in March 2017 as annual quota was filled (Graph 24). The following March, 12 664 tonnes were imported at the end of the quota period. According to SARS data, total US imports of bone-in portions for the April 2017 – March 2018 cycle reached 69 305 tonnes, against a quota of 65 000 tonnes.

Imports in December 2018 totalled 4 860 tonnes and were valued at R53.0 million (FOB). December’s imports were down 25.5 % (- 1 661 t) on November’s imports and down 48.3 % on December 2017 levels (- 4 533 t).

Poultry imports from the US for December 2018:

Tariff	Description	Import Quantity in kg	FOB Import Price in R	Unit Price in R per kg
0207.1290	Chicken: Not cut in pieces, frozen, whole and half chickens	25 236	R 283 564	R 11.24
0207.1411	Chicken: Boneless cuts: Breasts	289 646	R 4 700 579	R 16.23
0207.1429	Chicken: Offal: Other	24 000	R 334 480	R 13.94
0207.1493	Chicken: Other: Leg quarters	3 240 421	R 32 592 663	R 10.06
0207.1497	Chicken: Other: Thighs	159 444	R 1 275 410	R 8.00
0207.1498	Chicken: Other: Drumsticks	805 950	R 8 188 637	R 10.16
0207.2700	Turkey: Cuts and offal, frozen; Frozen Turkey portions and MRM	314 999	R 5 647 353	R 17.93
Total for:	United States in December 2018	4 859 696	R 53 022 686	R 10.91



American imports accounted for 12.9 % of total imports in December 2018. December’s imports from the US included 66.7 % frozen chicken leg quarters; 16.6 % frozen chicken drumsticks; 3.3 % frozen chicken thighs; 6.0 % boneless chicken (breasts); 0.5 % whole frozen chickens; 0.5 % frozen chicken offal (“other”) and 6.5 % frozen turkey cuts/offal.

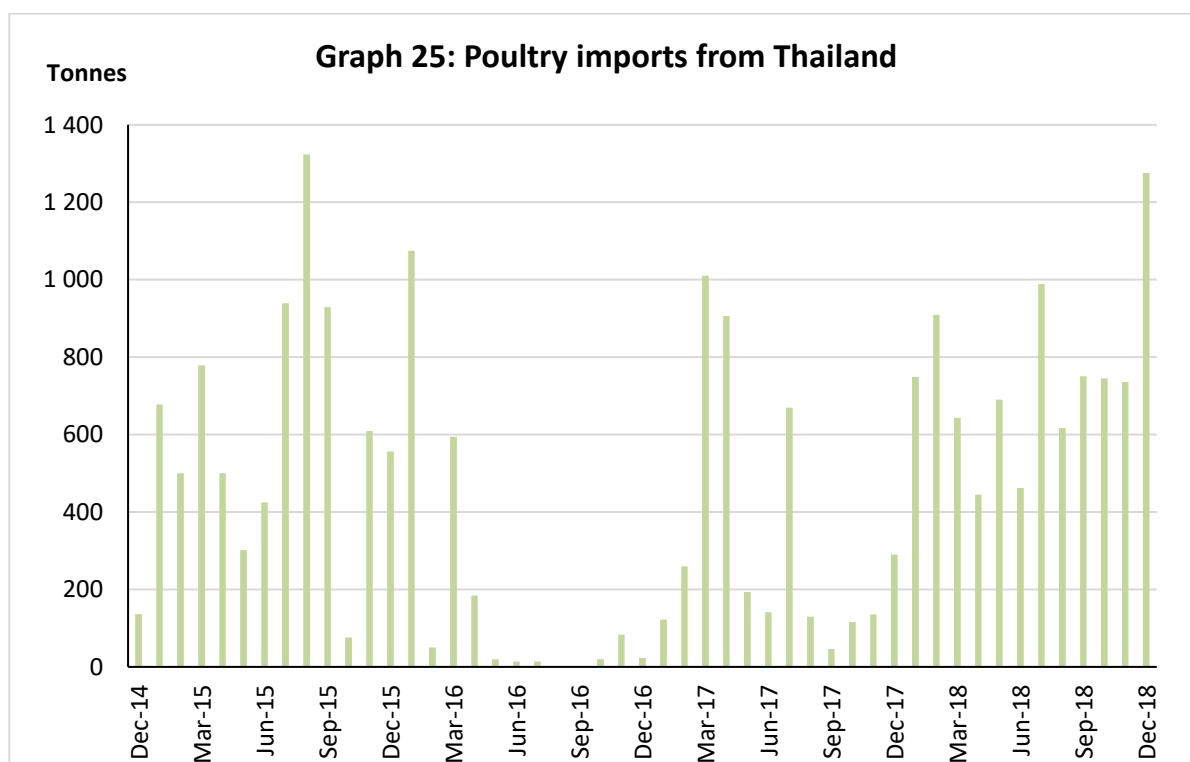
A total of 331 t of poultry meat was imported during 2015 from the USA. In 2016, 26 573 t of poultry products were imported from the US. Imports from the US in 2017 totalled 87 059 t (+ 228 % up on 2016). US imports in 2018 (91 374 t) are 5.0 % up on imports in 2017.

3.5 Poultry imports originating from other countries:

In December 2018, 1 276 t of poultry meat were imported from Thailand (Graph 25), up from 736 t in November (+ 540 tonnes; + 74.3 %). In December, 81.3 % of the Thai imports were mechanically deboned chicken (MDM); 16.3 % frozen boneless chicken cuts (breasts); 2.4 % duck products and small quantities of value-added chicken. Thailand accounted for 3.4 % of total poultry exports in December; at an FOB value of R14.6 million.

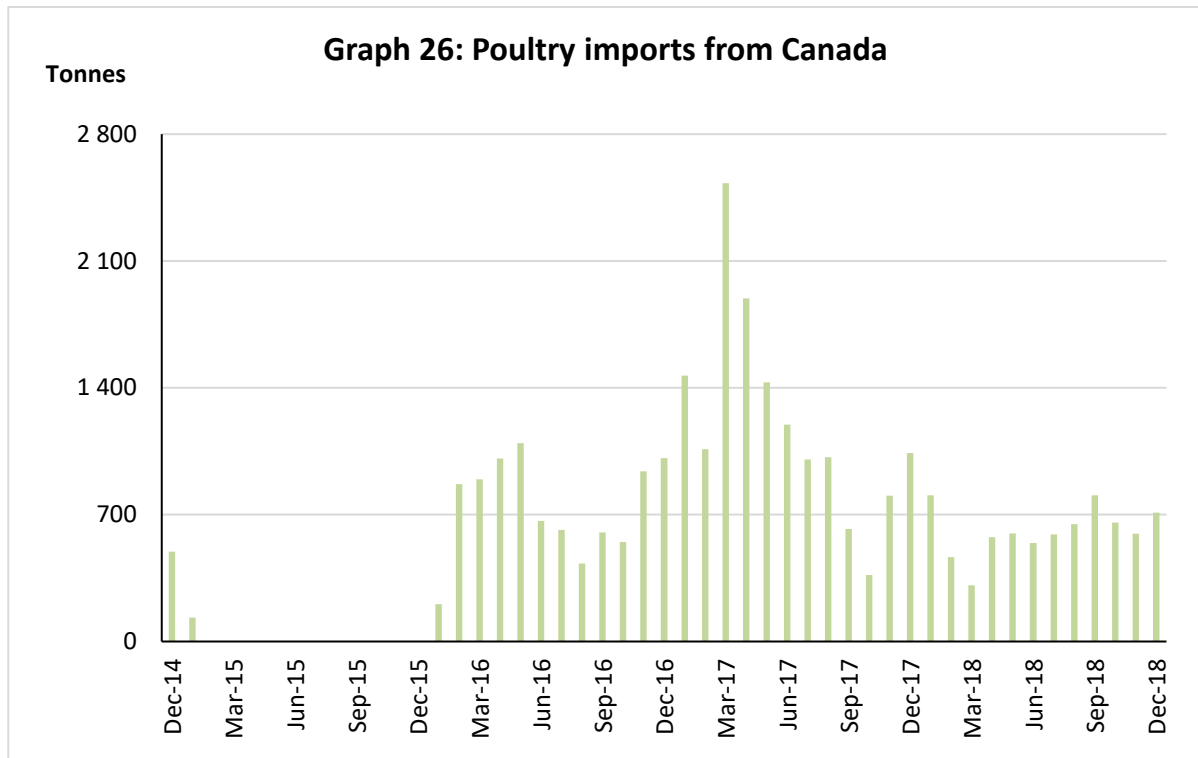
Poultry imports from Thailand for December 2018:

<i>Tariff</i>	<i>Description</i>	<i>Import Quantity in kg</i>	<i>FOB Import Price in R</i>	<i>Unit Price in R per kg</i>
0207.1210	Chicken: Not cut in pieces, Frozen Mechanically Deboned Meat	1 037 910	R 7 126 893	R 6.87
0207.1411	Chicken: Boneless cuts: Breasts	207 938	R 6 496 149	R 31.24
0207.4200	Ducks, Not cut in pieces, frozen	30 006	R 932 198	R 31.07
1602.3290	Chicken: Flavoured, herbed or marinated	18	R 247	R 13.72
Total for:	Thailand in December 2018	1 275 872	R 14 555 487	R 11.41



In 2016, Thailand exported 2 078 t of poultry products to South Africa. Imports from Thailand in 2017 totalled 4 019 t; an increase of 93.4 % on 2016. Thai imports in 2018 (9 011 t) are 124 % up on imports in 2017.

In December 2018, 711 t of poultry meat were imported from Canada at an FOB value of R12.0 m (Graph 26). Canadian imports made up 1.9 % of total poultry imports into South Africa in December and were up 19.4 % on November 2018 levels (+ 116 t). Imports were down 329 tonnes (- 31.6 %) on December 2017 levels. Of the Canadian imports in December, 62.4 % were frozen turkey cuts and offal; 11.2 % frozen chicken drumsticks and 26.4 % frozen chicken leg quarters.



Poultry imports from Canada for December 2018:

Tariff	Description	Import Quantity in kg	FOB Import Price in R	Unit Price in R per kg
0207.1493	Chicken: Other: Leg quarters	187 880	R 2 340 912	R 12.46
0207.1498	Chicken: Other: Drumsticks	79 500	R 1 257 271	R 15.81
0207.2700	Turkey: Cuts and offal, frozen; Frozen Turkey portions and MRM	443 155	R 8 420 195	R 19.00
Total for:	Canada in December 2018	710 535	R 12 018 378	R 16.91

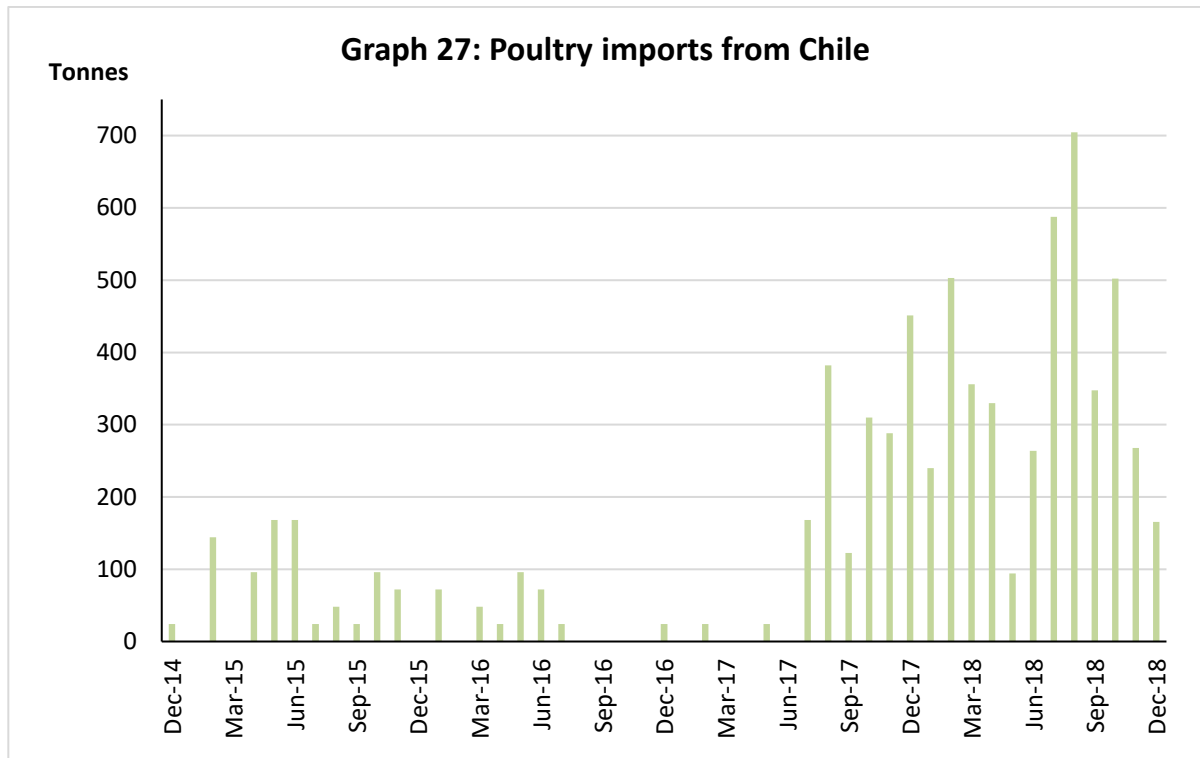
In 2016, 884 t of poultry products were imported from Canada. Accumulated imports from Canada in 2017 totalled 14 431 t; up 62.4 % on 2016. Canadian imports in 2018 (7 305 t) are 49.4 % down on imports in 2017.

In December 2018, 165 t of poultry meat were imported from Chile at an FOB value of R2.6 m (Graph 26). Chilean imports made up 0.4 % of total poultry imports into South Africa in December and were down 38.3 % on November 2018 levels (- 102 t). Imports were down 286 tonnes (- 63.4 %) on December 2017 levels. All the Chilean imports in December were frozen turkey cuts and offal.

Accumulated imports from Chile in 2017 totalled 1 770 t. Chilean imports in 2018 (4 362 t) are 147 % up on imports in 2017.

Poultry imports from Chile for December 2018:

Tariff	Description	Import Quantity in kg	FOB Import Price in R	Unit Price in R per kg
0207.2700	Turkey: Cuts and offal, frozen; Frozen Turkey portions and MRM	165 280	R 2 644 759	R 16.00
Total for:	Chile in December 2018	165 280	R 2 644 759	R 16.00



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