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MEDIA STATEMENT

WHEN YOU FAIL TO PLAN, YOU PLAN TO FAIL: SA's POULTRY SECTOR MASTER PLAN STORY

South Africa's Poultry Sector Master Plan (the PSMP, signed in November 2019), promised to stabilise an industry hammered by dumped imports. It undertook to grow jobs, broaden black ownership and unlock export markets. Six years on, the rhetoric remains loud, but delivery has been uneven.

This is the story of a well-crafted plan, which achieved early gains, but risks being remembered as momentum without movement.

The Master Plan was conceived as a public-private compact to rebuild the battered broiler value chain after years of chicken dumping on South African shores.

It focused on five core pillars:

- First, it sought to restore the effectiveness of trade remedies to curb a flood of dumped imports, which had been undermining local production.
- Second, it aimed to stimulate both local demand and production growth, strengthening the domestic industry.
- Third, it envisaged a massive expansion of chicken exports, raising volumes and opening new international markets.
- The fourth pillar focused on supporting transformation and broadening ownership.

Finally, the plan aimed to strengthen governance, monitoring and financing, including the establishment of an industry-government oversight council to ensure accountability and progress. With clear targets set for 2030, the master plan also introduced an implementation structure to track and guide progress over time.

After its signing, the industry moved swiftly. More than R2.2-billion was committed to new investment over the next five years, exceeding the Master Plan's target of R1.5-billion. Duties and trade remedies, assisted by bird flu outbreaks in the northern hemisphere, began to turn the tide on dumped imports, giving domestic producers room to breathe.

Large producers expanded facilities, signed up contract growers and created jobs in line with master plan commitments. Transformation projects took shape, with emerging farmers brought into value chains under formal off-take agreements.

These steps proved the plan's potential: when commitments were met, results followed. Alas, progress has slowed since the last election. The PSMP was delegated down to deputy ministers, and the process has lost impetus. Ministers have reaffirmed the Master Plan and pledged Phase-2 support. Government briefings in 2024 and 2025, including statements at a poultry conference by Gauteng MEC Ramokgopa and Minister of Agriculture John Steenhuisen, spoke of new financial packages, stronger veterinary surveillance, cold-chain upgrades, and greater support for small farmers. They also promised a mass vaccination campaign against bird flu to prevent another devastating outbreak.

Yet, despite strong words, there is little measurable delivery. Exports remain locked behind bureaucratic barriers and veterinary laboratories remain understaffed and outdated. Critical vaccination programmes have yet to gain any traction because the government refuses to relent on conditions that poultry producers say are unaffordable and not implementable.

The Master Plan made government directly responsible for securing veterinary protocols and trade agreements with key markets such as Saudi Arabia, the United Arab Emirates (UAE), and the European Union (EU). The government's job included upgrading animal health systems and certification capacity to safeguard exports and manage diseases, while rolling out blended finance to enable small and black-owned producers to scale.

On these fronts, results have been disappointing. Export negotiations have stalled, leaving producers who invested in world-class cold chain and processing facilities with no new markets to sell to. Veterinary laboratories, essential for issuing internationally recognised health certificates, remain underfunded and understaffed. As some industry insiders have said, "Exports die in the lab, producers are ready, but the paperwork isn't."

Ultimately, the Master Plan is about defending (and creating!) local jobs, advancing black ownership, and securing exports that could bring foreign revenue and strengthen food security. Every delay in opening export markets is a lost opportunity for black contract growers, for workers in processing plants and for all too many rural communities relying on the poultry value chain.

The Poultry Sector Master Plan was designed as a blueprint for growth: trade remedies to stabilise the industry, private investment to expand capacity, transformation to broaden ownership, and export channels to create sustainability. The industry has played its part, but policy inconsistency and administrative inertia are turning a national success story into a stalled project.

If the plan is to deliver its promise, government must move beyond pronouncements. That means publishing time-bound actions, accelerating veterinary and trade negotiations, and enabling the finance needed for small producers to stand a chance.

The compact was never about one side carrying the burden; for South Africa to reap the rewards in jobs, empowerment, and exports, both government and industry must deliver.

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