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Poultry Bulletin

THE TRADE ISSUE

OFFICIAL MAGAZINE OF THE SOUTH AFRICAN POULTRY ASSOCIATION

RIISING FEED PRICES AND OTHER MARKET TRENDS UNPACKED AND ANALYSED

DOWN WITH SHADY DEALS

**CLOSING
LOOPHOLES IN
ILLEGAL TRADE**

SCALING UP

**DO MORE BIRDS
MEAN BETTER
PROFITS?**

Quails in SA Turkeys in Oz

*Success on the fringes
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Someone sells, someone buys and so turn the wheels of the economy. You don't have to be an economist to know that for any business to succeed there has to be a market for what it is selling, and without a market even the best product won't turn a profit.

In the poultry industry, we are all too familiar with what happens when outside trade influences squeeze your market. Not for nothing does SAPA invest massive resources to promote a fair trading environment for its members but also for all South African producers.

In this issue we shine a spotlight on different corners of the poultry market, examine the issues that affect trade, and pass on the secrets of those who are trading successfully in a variety of different market segments.

As we go to print, we were very sad to learn of the passing of renowned economist Mike Schussler, who was a true friend to the poultry industry, and had often spoken out against the evils of dumping. In his last column for *Poultry Bulletin* (October/November 2021) he had analysed the impact of rising feed prices. We'll miss you, big Mike. Our heartfelt condolences to his loved ones.

Winter is extending its icy fingers, so take all the precautions to keep yourself and your flocks healthy and safe.

Melinda

editor@poultrybulletin.co.za

🐦 @melshaw001



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Editorial team

Editor: Melinda Shaw
editor@poultrybulletin.co.za

Editorial board: Gary Arnold, Izaak Breitenbach, Christopher Mason, Marthinus Stander, Vincent Sharp, Aziz Sulliman, Adel van der Merwe

Design and layout: Twisted Toast

Contributors: Michael Acott, Elaine Banister, Jason Bronkhorst, Nick Boulton, Glenneis Kriel, Ellen Heydenrych, Justine de Winnaar, Charmain Lines, Marlene Louw, Diane McCarthy, Tshepo Mogale, Johnny van der Merwe

Advertising & production

Ad sales & production manager: Louisa Nel
Email: advertising@poultrybulletin.co.za
Tel: +27 11 795 9920
Fax: +27 86 627 5897

Printing and binding: Seriti Printing

Distribution: The Tree House

South African Poultry Association Board 2021-2022

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Vice chair Adel van der Merwe

Executive member Gary Arnold

Members Willie Bosoga, Jake Mokwene, Vincent Sharp, Marthinus Stander, Colin Steenhuisen

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Invest in your relationships

Dear members

Relationships are an important aspect of human life, be they between husband and wife, parents and children, friends and neighbours. And as important as they are in your private life, so too in your business. That's why you should look at how you approach your business relationships. As a producer, do you jump from one supplier to another, and if so, what is making you do this? Is it price or service related?

Whether it's for feed, day-old chicks, equipment or medication, supplier relationship management is critical if you want your business to succeed, and yet is often overlooked. Do you as a producer ask the right questions at the outset to establish whether a new supplier can meet your needs, do you assess their performance throughout, and, when faced with a challenge, how do you approach it?

When it comes to procurement of any kind, you can measure your success based on your ability to deliver business outcomes.

Forming a relationship with your suppliers has several benefits to you as a producer. For one, as a loyal customer who brings repeat business, you may be able to negotiate better prices, or preferential delivery costs and improved priority service levels. Loyalty is highly regarded and getting onto a priority customer list could have material benefits.


As the relationship with your supplier grows, so trust develops. As a result, you might be able to access payment terms that would not be an option in the case of a once-off



'As a loyal customer who brings repeat business you may be able to negotiate better prices'

transaction. Regular suppliers will get to know your business and you might benefit from their networks when they see opportunities arise along the value chain and pass that intelligence on to you early.

Recently a shortage of day-old chicks caused problems for smaller farmers, as it so often does during peak business periods. In such times, farmers cast their nets wider and wider to try and secure stock, and unfortunately this plays right into the hands of scammers who sell empty promises, and disappear with the money. This would not happen to farmers who have strong relationships with their suppliers, who know their customers and plan accordingly.

In today's world, small farmers especially need to secure every advantage they can for their businesses. Your relationship with your suppliers could just be one of those advantages that spell the difference between success and failure. 

Chris Mason

Manager: Sustainability and Development



LETTERS

Questions about farming, and bouquets and birthday wishes from our readers



Advice sought for layers

I am starting to farm and keep egg layers, and I am looking for articles that will help me understand more on how to feed the egg layers. Can you kindly suggest any past articles from the *Poultry Bulletin* that I might download?

Thank you for coming back to me.

Hangwani Matidza

Sibasa, Limpopo

Ed: As a start, read "Ask the Experts" on page 60. We recommend that you join SAPA to gain access to the whole network of experts and useful reports – see page 27 on how to join, if you have not yet done so. Good luck!



We want to hear from you.
Send your letters to editor@poultrybulletin.co.za



Praise for Poultry Bulletin

I wanted to commend you on the great work you are doing with the PB magazine.

It's truly a credit to the industry and strikes the right balance in terms of capturing issues that affect different parts of the value chain as well as different enterprise types (small to large scale operations)

Looking forward to many more publications!

Ade Camngca

MD Ruffled Feathers Meat, Heidelberg

Happy birthday

Happy first birthday, *Poultry Bulletin*! I wish you all the best, may you grow from strength to strength. *U khule ube mngaka.*

Ernest Minyelela

Vleidraai Farm, Matatiele

Ed: Thanks Ernest! Your copy of the limited-edition *Poultry Bulletin* notebook is in the mail.



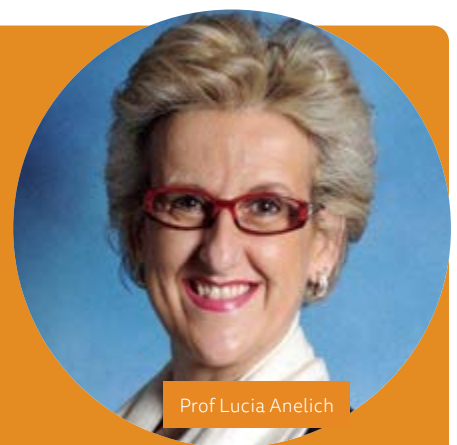
Spotted in Poultry Bulletin

Thank you for featuring us in April/May issue of *Poultry Bulletin* in "How the cull trade stretches the value chain" – Thabang Nkgau has been my farm manager since 2016; he is a hard-working chap!

Vuyisile Mgujulwa, Mgujulwa Farms, Boksburg

Winner!

Sammy Sehoana is the winner of a ticket to the Food Safety Summit, which takes place on 7 and 8 June 2022. The summit, hosted by Anelich Consulting and Food Focus, is an online, live-streamed event this year. Scan the QR code with a smartphone to register before 7 June and you could still attend the summit.



Prof Lucia Anelich





NEWS IN BRIEF

Bite-sized portions of the latest poultry news to stick on your pinboard

Compiled by **Charmain Lines**

RCL grateful to have been largely spared by KZN floods



Transport of agricultural products has been severely affected by the flood damage in KZN

SAPA members were extremely fortunate to be spared the worst effects of April's catastrophic flooding in KwaZulu-Natal, which left over 400 people dead and caused over R48 million in damage to crops, livestock and agricultural infrastructure.

In a statement issued in mid-April, the KZN Agricultural Union (Kwanalu) warned of the impact on agriculture, specifically as far as produce destined for export markets were concerned, given the damage to roads, bridges and, especially, the port of Durban.

As one of South Africa's largest producers of chicken, with the bulk of its operations in KZN, RCL Foods was grateful to report minimal damage. According to Marthinus Stander, managing director of the company's chicken division, the damage was limited to one chicken house that was partly swept away in floodwater and one and a half processing shifts that were lost as employees could not travel to and from work.

There was some flooding at the processing plant, and debris and mud

on the access roads had to be cleared before operations could resume fully, he said.

"The heroes of the RCL story, however, are our employees," Stander said. "Many of our people suffered flood damage to their homes and were left without water and electricity for days. We expected a far bigger impact on our operations, but that did not transpire because our employees managed to come to work. Their resilience and diligence were an inspiration to us all." 📺

Don't fall for fake exporters



It would seem that no-one, not even the world's biggest exporter of chicken products, is safe from crooks and scams.

The Brazilian Animal Protein Association (ABPA) has just launched a campaign against fake sales in the international market. The association, together with ApexBrasil, Brazil's exports promotion agency, is warning importers and potential customers against fraud and fake sales that are impacting chicken and pork exports from that country.

The ABPA campaign advises people to contact the association or the Brazilian embassy in their country before proceeding with a payment or any kind of transaction when they are dealing with an exporter they do not know.

As measures are being tightened to ensure all South African chicken imports are above board, local business people considering import opportunities will do well to be vigilant. 📱

CHICK OF THE MONTH



Bonjour, La Fleche

Did you know that there is a list of chicken breeds at risk of becoming extinct? Compiled and updated by The Livestock Conservancy, the conservation priority list includes, among a surprisingly large number of other breeds, La Fleche. This beautiful, gleaming black chicken is also known as the Devil's Bird, courtesy of a split comb that does look rather devilish.

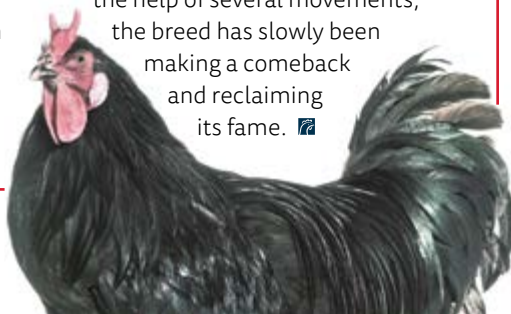
But eye-catching headgear is not the breed's most interesting feature. Thought to have been around since the 15th century, La Fleche (French for "arrow") is a chicken that loves open spaces and solitude. As one of the best fliers in the poultry world, these birds can easily clear a 2m-high fence and often roost in trees. They are not sociable and at best tolerate people – don't expect a cuddle from La Fleche. No surprises then that they

prefer foraging to brooding and make very poor parents.

La Fleche chickens are good layers – around 180 bigger-than-average white eggs per year – but are renowned for their meat. An even distribution of fat across the breast, legs, thighs and even the back results in succulent, tasty dining.

The only drawback is that it takes at least 10 months before a bird reaches slaughter weight. It is this very tardiness that drove them to the edge of extinction. Once considered the best table bird around, the advent of fast-growing breeds pushed La Fleche off menus across Europe after World War II. Fortunately, with the help of several movements,

the breed has slowly been making a comeback and reclaiming its fame. 📱



There's a chicken in my kitchen!



But not in the way they usually are!

Cape Town-based stylist Sumien Brink is paying tribute to some of the world's most handsome chickens by having them pose regally on hand-stitched, 100% linen tea towels.

"My first range of vintage-printed tea towels is called Fauna and Flora and celebrates historical illustrations of plants and animals – chickens and ducks included – in the style of bygone times," explains the former *Visi* magazine editor, who calls herself a "purveyor of fine *lappies*".

Tea towels can be sent anywhere in South Africa to delight a poultry lover's heart, at R350 including postage. See all the designs at @sumienbrink on Instagram or send an email to sumien.brink@icloud.com for more information. 📱

A volatile time for the rand

By **Dr Marlene Louw**



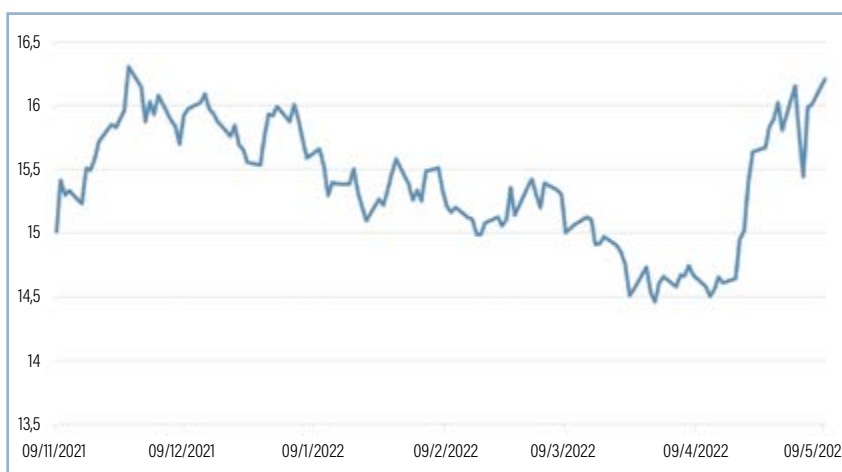
The **ZAR/USD** exchange rate is an economic variable that has broad-based implications for the agricultural industry. It is closely linked to input costs such as those of fuel and fertiliser but also feeds into output prices since South Africa is linked to global markets.

Through the first quarter of 2022 the rand was fairly strong on the back of high export commodity prices for products such as radium and iron. This, in turn, supported the balance on the current account which strengthened the rand to levels of around R14.50 between mid-March and mid-April (see graph).

Since then, the ZAR/USD exchange rate has depreciated by more than 10%. Several factors contributed to this. Globally, inflation figures released in mid-April confirmed March as yet another month in which global prices surged, which, in turn, lead to expectations of increases in US interest rates. The latter causes emerging market currencies to depreciate as it becomes more attractive to hold dollar-denominated assets when US interest rates increase.

The spread of Covid-19 in China and the lockdowns that followed, cause further concern. This is expected to weigh on global growth prospects which also affects the currencies of emerging market economies negatively.

Here in South Africa the severe impact of the floods in KZN and intense spells of load shedding during the second half of April contributed to the slide in the rand.




▲ ZAR/USD exchange rate over the past six months
Source: Reuters, 2022

Our views are that the rand will continue to be under pressure throughout 2022 and will end the year at around R16 to the US dollar. At the time of writing, the rand was already weaker than our projections for the end of Q2 2022. The fundamental factors at play, however, still suggest that levels of around R16 to the dollar are plausible as we approach the end of the year. These factors include continued tight US rate expectations, softer ongoing load shedding and softer global commodity prices. The latter is a result of a slowdown in the Chinese economy which could erode South Africa's terms of trade, leading to pressure on the current account, which in turn causes the rand to depreciate.

Over the coming months, key global and macro-economic variables to watch would be the global inflation trajectory and global growth. There are, however,

diverging views on what inflation could look like going forward. Some analysts believe that the economic slowdown in China will curb global inflation going forward, while others view further supply disruptions such as a drought in the US, which would affect grain prices and global food inflation, as a material risk for inflation to gather new momentum. This would lead to tighter monetary policy and could also provide upside risk for the rand.

At this point, there are no clear signs of how global inflation and growth can play out. What does look increasingly certain is that pre-pandemic normalcy is unlikely to return to markets soon and currency volatility will be the name of the game as market stakeholders try to navigate these uncertainties. 

Dr Marlene Louw is a senior economist at Absa Agribusiness



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ILLEGAL IMPORTS: CLOSING THE LOOPHOLES

Increased collaboration between a variety of organisations leaves dodgy importers and their shady deals less wriggle room. **Charmain Lines** examines the strands that weave this safety net.

Trade across borders and continents is vital to the sustainability and wellbeing of the global village. Unfortunately, partners don't always play fair.

The South African chicken industry for one is all too familiar with the harm that predatory trade practices like dumping, roundtripping and misdeclaration and underdeclaration can do.

The numbers paint a grim picture. Research done by Tax Justice SA in 2019 estimated that no tariffs are paid on at least 20% of all imports, costing the country more than R300 billion per annum. An investigation conducted by the SA Poultry Association at the same time revealed that at least 40% of chicken product imports

arrive in South Africa at prices that can only be explained by dumping or by exporters and importers not paying the relevant duties.

It therefore makes sense that the poultry industry master plan includes "enhance the regulatory framework and ensure compliance" as one of the five pillars in its first phase to rejuvenate and grow the local industry.

Over the past two and a half years, noteworthy progress has been made on several fronts to give effect to this pillar. "The days of lawless trading are numbered thanks to the excellent and ever-growing collaboration between organisations throughout the value chain," says Izaak Breitenbach, GM of SAPA's Broiler Organisation.



Declarations and duties

One of the most significant advances came when the SA Revenue Service (SARS) added poultry to its list of priority industries in 2021. According to SARS, a priority industry is one to which specific attention is paid to ensure imports are correctly declared and the required duties are paid in the interest of protecting local production and/or manufacturing. The priority list currently also includes textiles and sugar.

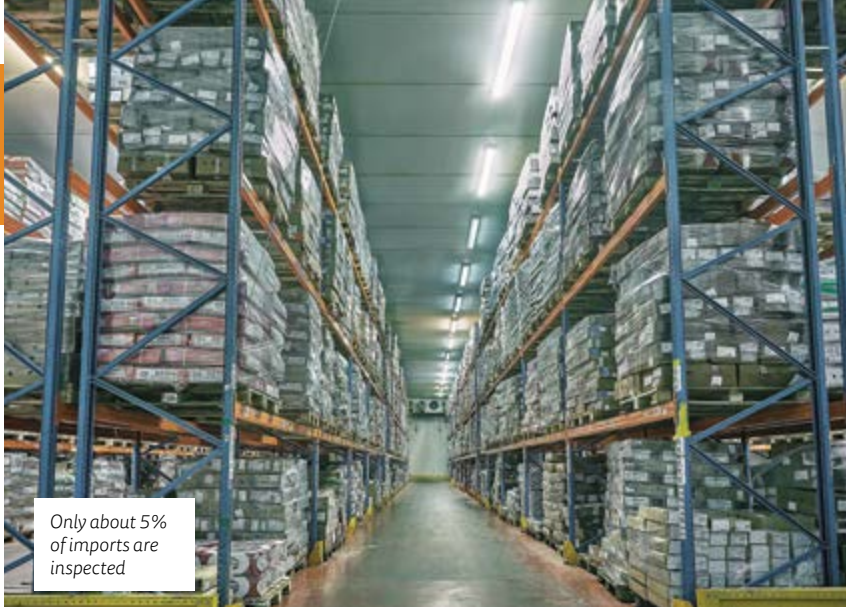
Following the SARS declaration, SAPA trained 120 SARS inspectors and administrators based at air- and sea ports on the intricacies of poultry production, packaging and pricing to better equip

them to spot illegal trade practices.

The first part of the training explained chicken portions and how importers mix different portions, and even portions and offal products, to get away with inaccurately declaring their transactions. "We showed the SARS officials what a 10kg block of frozen portions looks like and pointed out the things that could make it difficult to correctly identify cut-up pieces of meat," says Breitenbach. "One has to remember that big chunks of frozen meat don't look anything like the neatly packaged portions you find in a supermarket freezer."

The training also educated officials on how some unscrupulous importers avoid tariffs.





Only about 5% of imports are inspected



Different cuts of meat attract different duties



Examples include declaring whole chickens as mechanically deboned meat (MDM) and cutting whole birds in half and declaring the consignment as portions. Different cuts and types of meat attract different duties, hence it is in the interest of an importer's bottom line to submit a declaration to SARS that would result in the lowest possible duty. Such mis- and under-declarations are a huge and recurring problem.

The session on pricing clarified production costs in South Africa and in the countries that are the main sources of imports, and why, for instance, it is simply impossible that chicken feet can be imported at a higher price than bone-in portions. "This is not a fictional example," says

Breitenbach. "I have seen import documents where an importer declares outrageously high values for the low-tariffed cuts and low prices for the high-tariffed ones."

The training sessions were an eye-opener for the SARS officials as individuals but also as a team. With administrators who process the paperwork and inspectors who look at the actual products better equipped to correctly interpret what they see, enforcement has already improved significantly.

"Over the years SAPA has seen the many ways unethical importers employ to avoid paying the duties they should," says Breitenbach. "Sharing this information with the SARS officials was a

THE ROUNDTIPPING RUSE

Roundtripping is all about tax avoidance and can take two forms:

1. The origin of an imported product is obscured. It is known that duty-free chicken that come into South Africa in terms of trade agreements is thawed and repacked, fraudulently presented as a South African product, and then exported to members of the Southern African Customs Union (SACU) without attracting tariffs.
2. Imports that are supposedly intended for a neighbouring state (which means they should just be transported through

South Africa and hence do not attract South African taxes) only make it as far as a border post. Instead of crossing the border, the chicken products remain in South Africa for unscrupulous retailers and traders to buy and sell as part of an illegal network. Again, local products are displaced, and unpaid taxes hurt all SACU member states.

Roundtripping is particularly prevalent at border posts between South Africa and Mozambique and South Africa and Lesotho. The scale of the problem is illustrated by a case currently under investigation that involves products valued at R100 million.



The border posts between South Africa and Lesotho, as with Mozambique, have been found to be hotspots for roundtripping of imported poultry





great opportunity to empower them to advance the objectives of the master plan.”

While the training was a once-off initiative, SAPA and the Association of Meat Importers and Exporters (AMIE) have quarterly meetings with the SARS Poultry Desk where industry players table problematic issues and SARS officials give feedback on investigations.

One of the first successfully investigated cases resulting from these joint efforts is currently in court. It involves an importer who brought in 27 000kg of chicken meat without paying the required tariffs and VAT. The culprit also tried to bribe the SARS inspectors. SARS also recently reported cases of roundtripping (see sidebar opposite) and underdeclaration and is investigating allegations of AGOA quotas allocated to BEE importers being sold to white-owned companies. (The African Growth and Opportunity Act – AGOA – is a trade agreement between America and sub-Saharan Africa that includes a quota system.)

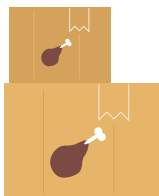
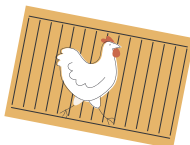
“The media attention these cases receive is definitely a deterrent,” says Breitenbach. “We are very pleased with, and grateful for, the solid cooperation between the industry – SAPA and AMIE – and SARS. We all work well together to deliver meaningful results.”

Closing the quality loop

The Food Safety Agency (FSA) has long been a feature of the meat industry in South Africa as a government-assigned body to help enforce the legislation that promote meat safety and quality in South Africa. While safety is the focus for red meat and abattoirs, inspections on processed and poultry meat and eggs are confined to matters of labelling and quality as specified in the Agricultural Products Standards (APS) Act and the regulations.

Having always done its work behind the scenes, the Food Safety Agency will in future be visible to the public too through its newly created certificate of good standing and related mark.

It all started with a request from SAPA in 2021, explains Nicole Bergh, compliance manager at the FSA. “Izaak Breitenbach approached us with an idea to improve industrywide compliance by



THE MARK OF QUALITY



The new FSA certificate and related mark work as follows:

- To obtain a certificate of good standing, a facility must undergo an inspection by the Food Safety Agency to confirm its compliance with the regulations and the APS Act.
- If an applicant is found to be compliant, the agency will issue a certificate at no cost and provide the producer with 2 500 stickers bearing the FSA mark which can be used on its packaging. The mark is also available electronically to compliant applicants.
- To maintain its certificate, a facility must undergo regular inspections, its accounts must be up to date, it should have no existing or pending exemption agreements and not more than one direction issued against it for the same noncompliance.
- The Food Safety Agency will stipulate the validity period of each certificate, but it will not be longer than six months.
- Consumers can look out for the FSA mark on chicken in their local shops, to ensure they buy products that comply with the regulations.

For more info, contact Armand Visagie, market-ing manager, at armand.visagie@afsq.co.za or call the Food Safety Agency office on 012 361 1937.



MARKET SECURITY

publicly recognising producers and facilities that do the right things.”

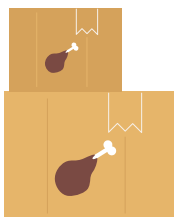
Breitenbach's suggestion came hot on the heels of requests from retailers for a list of poultry product suppliers that comply with all the applicable acts and regulations.

The FSA took up the challenge, developed the process and obtained the necessary approvals from the Department of Agriculture, Land Reform and Rural Development. Recently completed, work is now underway to market and implement the certificate and its related mark.

“It is an entirely voluntary process,” stresses Bergh. “No supplier or facility can be forced to undergo an inspection – although refusing to do so is a criminal offence in terms of the APS Act – but by recognising those that do and emerge fully compliant, we hope to create a juicy carrot that entices more people to put quality first.”


The Food Safety Agency estimates that currently only about 5% of imports are inspected, instead of the required 30%. By creating a strong and immediately recognisable way for consumers to identify quality suppliers and make their purchasing decisions accordingly, the Agency believes that standards and compliance alike will improve.

Retailers that have pushed for this development have already indicated that they would not buy from producers that cannot point to a certificate of good standing on their wall.



Retailers will support compliant producers

“The certificate and related mark complete the golden thread that should run from legal import practices through to quality poultry products on the shelves,” says Breitenbach.

This thread can only be maintained and strengthened when all stakeholders collaborate to protect the market. It entails putting the right measures in place and making sure they are diligently enforced so that transgressors are sanctioned and those who comply are rewarded. “This is the kind of trade environment we and our partners are working to achieve, not only to benefit the local poultry industry and the economy, but in the interest of every consumer who relies on affordable, high-quality chicken on their dinner table,” concludes Breitenbach. 

IT'S NOT ONLY SA'S PROBLEM

The poor functioning of the Southern African Customs Union (SACU) and deficiencies in South Africa's regulatory and enforcement processes allow importers and exporters to divert many tons of imported chicken from South Africa into neighbouring countries, in ways both legal and illegal.

Due to the lack of regular engagements between SACU member states, custom officials are often not entirely sure of the rules. For instance, US chicken gain duty-free access into Namibia from South Africa under the AGOA banner – even though the annual quota of 65 000 tons applies to South Africa only.

Poor enforcement of regulations in South Africa also allows roundtripping.

Add to this the reality of porous borders between neighbouring countries and blatantly illegal practices employed by unethical traders – such as the perennial phenomenon of chicken “falling off the back of a van” – and you end up with a toxic mix of local markets being flooded by products that undercut local producers and governments not collecting rightful taxes.

LET'S **RUFFLE** SOME FEATHERS!



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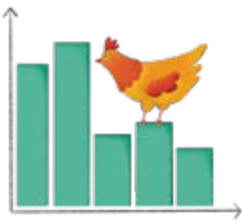


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MEMBERS' NOTICEBOARD

A handy summary of all the key notices that the South African Poultry Association sent to members in the last couple of months

Compiled by **Michael Acott**

Progress in the battle against illegal trade

Some good news in the feedback to the board by Broiler Organisation GM **Izaak Breitenbach**

Izaak Breitenbach reports on the actions taken against offenders who evade import duties



The SA Poultry Association is making very satisfactory progress in combating the issues of unfair and illegal trade in poultry that have plagued the industry for many years.

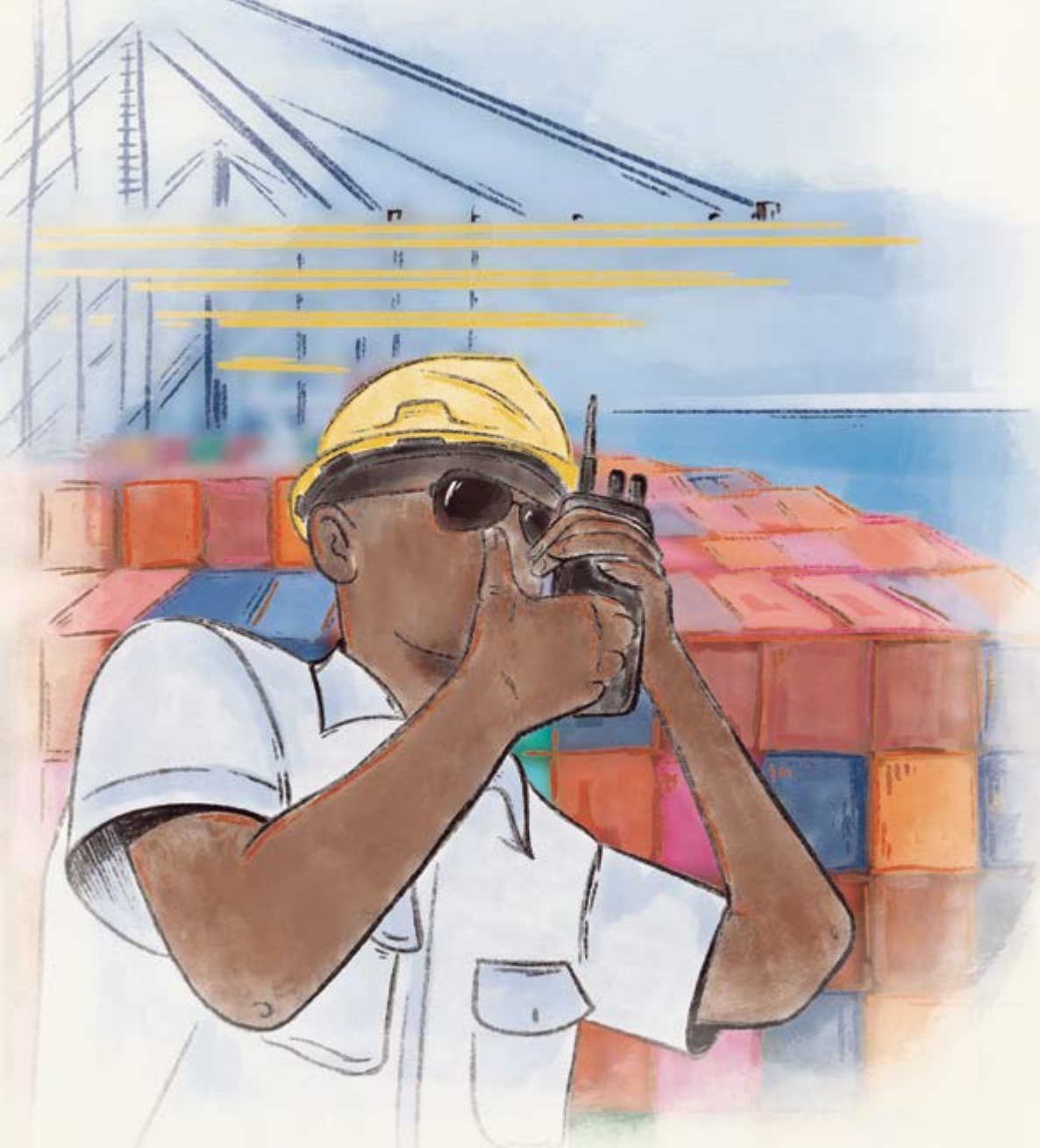
Our most notable achievement has been the successful applications for antidumping duties to help stem the flood of dumped bone-in chicken imports. With the announcement in December of provisional antidumping duties against Brazil and four European Union countries, we now have antidumping duties in place against nine countries.

The provisional duties apply to Brazil, Denmark, Ireland, Poland and Spain. Antidumping duties against Germany, the Netherlands and the United Kingdom have been extended for a further five years. Antidumping

duties against the United States have been in place since 2000, and we will apply to have them extended again when they come up for renewal later this year.

There has also been heartening progress in securing action against illegal trade. Here we talk about the evasion of import duties and taxes by underdeclaring the value of chicken imports, declaring them under the wrong tariff heading, or round-tripping – retaining consignments in the country when they have been imported free of duties because they are supposedly destined for re-export.

As I reported in the previous issue, the SA Revenue Service (SARS) is stepping up its actions in terms of the poultry master plan to counter illegal trade. I reported then that the first



◀ SARS inspectors have their work cut out for them to identify import consignments that are declared under the wrong tariff headings to evade paying duties

offenders have been found guilty and product to the value of R100 million was confiscated (read also “Illegal imports: closing the loopholes” on page 12.)

Subsequent SARS actions include investigating some 80 consignments of poultry offal suspected of being declared under the wrong tariff heading, and 139 export entries from bonded warehouses are being investigated for roundtripping. One

illegal-trade case is currently before the courts and we hope that the SARS investigation will lead to additional prosecutions.

We can at last look forward to the day when the problem of illegal trade is a thing of the past. 🐔



SARS is stepping up its actions to counter illegal trade and the first offenders have been found guilty



Prepare for a high risk of AI outbreaks this winter

Categorical breakdown of HPAI H5N1 outbreaks per province*

Province	Backyard	Layer breeder	Pullet rearing	Layer	Broiler breeder	Broiler	Small scale	Ostrich total	Total
E. Cape	3						1	2	6
Free State	1	1				1			3
Gauteng	1			8	2		13		24
KwaZulu-Natal				6	4		6		16
Limpopo									0
Mpumalanga		1							1
North West				3	1				4
N. Cape									0
W. Cape	4		2	8	3	2		11	30
Total cases	9	2	2	25	10	3	20	13	84

*DALRRD, 25 March 2022. Avian Influenza: H5 and H7 outbreak update report

▲ Category breakdown of HPAI H5N1 outbreaks per province
Source: SAPA

There is a high risk of avian influenza (AI) outbreaks in South Africa this winter, leading to large numbers of birds having to be culled, according to SAPA's avian influenza monitoring report for the first three months of the year.

Since the start of the northern hemisphere winter, there have been severe outbreaks of highly pathogenic avian influenza (HPAI) in that part of

the world, including North America.

"All indications are that there is a high risk of HPAI outbreaks occurring in South Africa during the winter of 2022," the report says.

"International opinion remains opposed to vaccination against HPAI, so losses to the poultry industry will be high if this does occur."

The industry has already suffered severe losses since the current outbreaks started in April 2021. Up to mid-March this year, a total of 3.7 million birds have been culled, 2.9 million in the egg industry and 800 000 in the broiler industry. The

As AI is mostly transmitted by wild birds SAPA is encouraging producers to submit wild bird samples from areas adjacent to their farms



losses represent 2.6% of the national flock, 9.6% of the egg industry flock and 0.6% of the broiler flock.

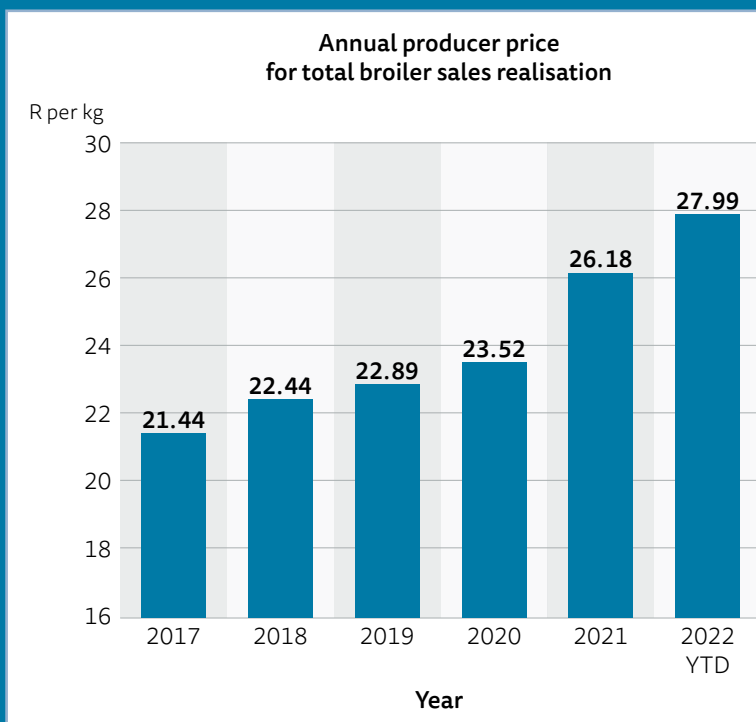
The egg industry in Western Cape has suffered the greatest losses, with an estimated 30.6% of their layers having been affected by the H5N1 outbreak.

There have been 145 HPAI outbreaks to March 2022, with 13 new cases reported in the first quarter of this year. The highest number has been in the Western Cape (68) followed by Gauteng (39) and KwaZulu-Natal (18).

Producers are advised to remain on the alert and continue to comply with HPAI protocols. The ongoing submission of test results to SAPA is an important part of the surveillance programme.

SAPA is taking a number of steps to improve biosecurity and AI monitoring. Because most AI outbreaks are transmitted by wild birds, SAPA is encouraging producers to submit wild bird samples from areas adjacent to their farms.

The SAPA biosecurity training initiative run by Afrivet is being used to inform small-scale producers about avian influenza. 📺



▲ Average weekly production per annum
Source: SAPA

Producer prices rise in 2021

Average annual broiler producer prices rose by 11.3% in 2021, according to SAPA's recently released broiler price report for January 2022.

Previous annual producer price increases were 2% in 2019 and 2.7% in 2020. The increase for January is 6.9%.

The average producer price for 2021 was R26.18/kg. The average includes fresh (13.3% of the total) and frozen (86.7%) broiler sales for the year.

Fresh chicken averaged R34.54/kg in the fourth quarter of last year, and R33.82 for the 2021 year, an increase of 6.3% over 2020.

Frozen product, including offal, averaged R26.79/kg in the fourth quarter, and R25.08/kg for 2021, an increase of 11.8%.

Mixed IQF portions averaged R25.64/kg in 2021, an increase of 12.3% over 2020.

SAPA says it should be noted that producer prices were still recovering in the last quarter of 2020, after Covid-related lockdowns, and that food-price inflation has become a global issue. 📺



Import values rise as volumes drop



Chicken import tonnages are declining, and getting more expensive, both of which are good news for South Africa's poultry producers who compete with imported products.

While import tonnages have been dropping since 2018, there has been a sharp increase in the landed value of those imports over the past year. That indicates that importers are paying higher prices for lower volumes.

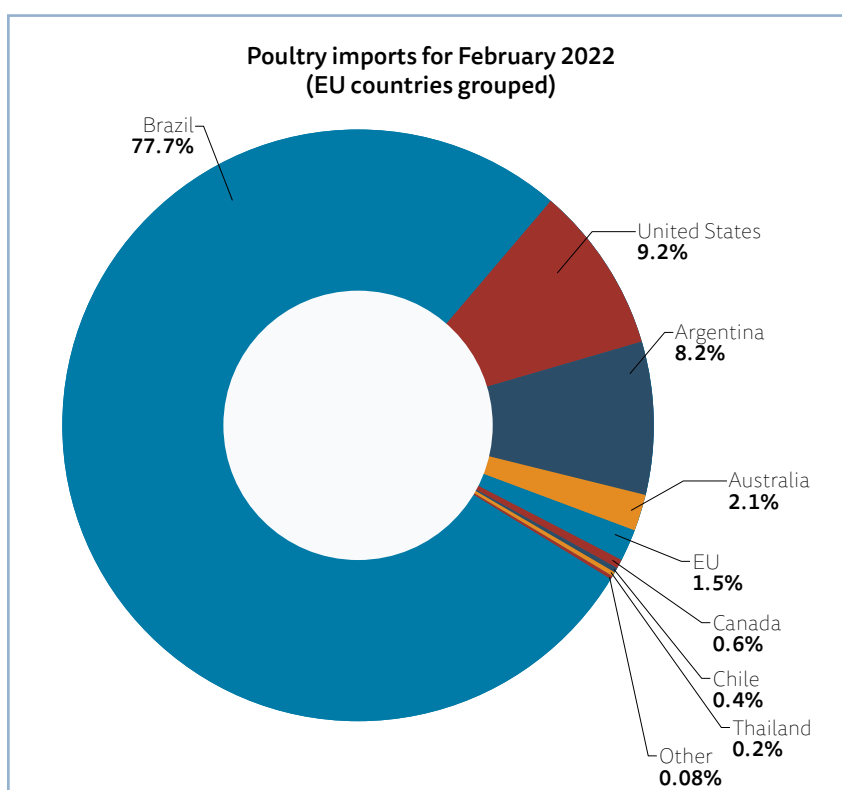
Official import statistics for February, the latest available, show poultry imports that month totalled 32 869 tons. This is 2.7% below import volumes in January, and 9.1% below February 2021.

Nearly all (98%) of February's imports were chicken meat. Broiler imports were 32 214 tons, marginally (0.8%) up on January, but 8.1% below February last year.

The landed cost (FOB) of February's poultry imports was R403.05 million, of which R386.4 million was chicken meat. Poultry imports were 3 662 tons lower than February 2021, a 10% drop, but those lower volumes cost 21.8% or R72.1 million more than a year ago.

The value of imports more than doubled in the year to January 2021. The increases were 103% for all poultry and 101% for broilers.

Broiler imports cost slightly more (R35 million) in February compared to the previous month, but higher prices were paid for lower volumes compared to a year ago. While broiler import volumes dropped 8% over



▲ Poultry imports for February 2022
Source: SAPA

the year, the landed cost was R85.9 million or 28.6% higher than in February 2021.

There was mixed news about bone-in imports – the frozen leg quarters, thighs and drumsticks that compete with local IQF packs.

Although February's bone-in imports were 2 567 tons, or 26.7%, below February a year ago, there was a month-on-month rise of 8.7% over January. Whether that is a trend will become clearer in the months to come. 📊



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To find more about Surmax's positive impact for animal and human health please contact your Elanco representative or visit www.elanco.com


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¹. Reference - Data on file. ELA1800037 trial at University of Parana - Dr. E. Santin et al., 2017. The use of antibiotics as growth promoters in performance and intestinal health in broilers challenged with Eimeria and Clostridium perfringens.

². WHO. Critically important antimicrobials for human medicine. 2018. <https://apps.who.int/iris/bitstream/handle/10665/312266/9789241515528-eng.pdf?ua=1>.

³. WHO 2017 Guidelines on use of Medically Important Antimicrobials in food producing animals. <https://apps.who.int/iris/bitstream/handle/10665/258970/9789241550130-eng.pdf;jsessionid=B982A811C8A4F2F79F5C306E2B647D62?sequence=1>.

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Five years of rising feed costs



The sharp increase in feed prices over the past five years is highlighted in SAPA's report on key market signals for the quarter to December 2021.

Feed prices can comprise 60% to 70% of the input costs for poultry producers.

From the third quarter of 2018 to the same quarter in 2021, feed price increases outstripped increases in broiler revenues. These increases to December last year show how feed prices were rising before the current impact Russia's invasion of Ukraine has had on grain, fuel and fertiliser prices since March 2022.

Prices have climbed steadily since mid-2018. Prices in 2021 were 27% higher than in 2016, at the height of the last drought.

The average feed price indicator has risen from R5 016 per ton in 2017 to R5 618/t in 2019 and R7 102/t in 2021. There was a slight dip to R7 070 in the fourth quarter of 2021, and to

R6 959 in December 2021, but the fourth quarter feed price indicator was higher than the same quarter a year previously.

After rising 14.3% in the second half of 2020, the year-on-year feed price increases for the four quarters of 2021 were 23.7% in Q1, 20.1% in Q2, 14.6% in Q3 and 6.8% in Q4.

In addition to sections on broiler production, prices and imports which are covered elsewhere in this issue, the key market signals report also looks at exports and retail mark-ups

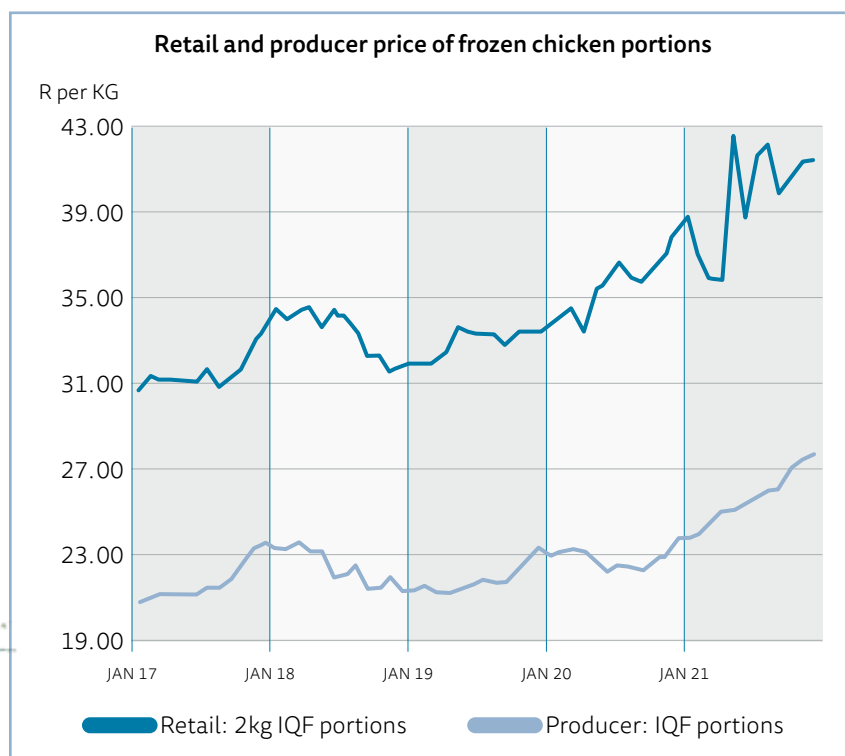
to the end of 2021.

Most chicken products doubled or nearly doubled in price from producer to retail shelves. The exception is the popular IQF bags, where the average mark-up was 54.6% in 2021. Frozen portions excluding IQF went up by 90.6%, whole fresh chickens by 98.2%, and fresh chicken portions by 109%.

Poultry exports have declined annually since 2019, but the industry anticipates an exports boost by the end of 2022. 📈

Retail and producer price of 2 kg IQF bags from January 2017 (R/kg)

▼ Source: Statistics SA



Brace yourself for increases



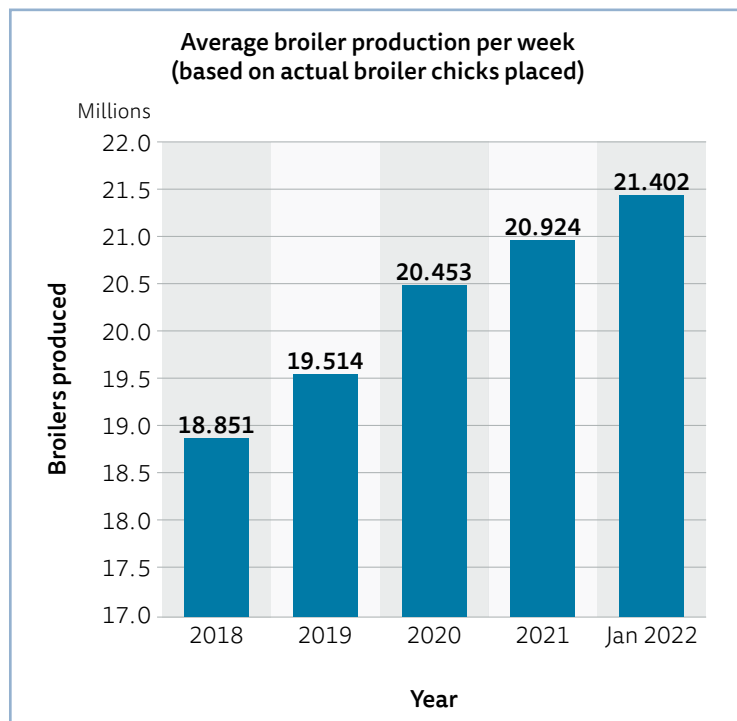
Further steep increases this year in broiler feed prices are predicted in SAPA's latest feed ingredient report.

Forecasted feed prices for September 2022 show yellow maize prices rising by 40% year on year, to R4 520 per ton in Randfontein and 4 610/t in Pietermaritzburg. Soya meal is predicted to rise by 24% to R9 800 and R9 950, and fishmeal by nearly 5% to R18 900/t in both centres. Sunflower oilcake is predicted to be nearly 10% down on an annual basis to R5 425/t.

SAPA cautions that the forecasts are based on the opinion of an independent consultant, and are for guideline purposes only. SAPA does not warrant that the predictions will be realised.

The international rise in maize prices is due largely to the impact of the Ukraine conflict on plantings and supplies. The consultant says that if Ukraine is able to export again, this may depress prices, but that would depend entirely on how much maize is planted in the United States and in Ukraine. 📷

Broiler production on the up and up



▲ Average weekly production per annum
Source: SAPA

South Africa's annual broiler production has climbed steadily since 2017, averaging nearly 21 million birds per week in 2021. This increased to 21.4 million birds per week in January this year

The 2021 total was included in SAPA's recently released January 2022 broiler production report.

Production has increased steadily from 17.8 million birds per week in 2017, to 18.9 million in 2018, 19.5 million in 2019 and 20.9 million birds per week in 2021.

Despite the increases, broiler production is below industry potential. The 2021 averages for actual and potential production were 20.9 and 22.2 million birds per week respectively. This difference of 1.3 million broilers per week means production was 5.8% below potential in 2021.

This trend continued in January 2022. The monthly total was 1.4 million birds per week fewer than the potential production of 22.8 million birds per week. 📷



Concern about cull trade numbers


More than a million live chickens were sold into the cull trade in the first quarter of 2022, amid concerns that cull-trade sales are being underreported.

The cull trade is an important feature of South Africa's informal economy, and part of the poultry value chain. Spent hens are sold to cull traders and then distributed in townships and rural areas.

Because of outbreaks of highly pathogenic avian influenza (HPAI), the movement of live birds has been regulated since 2017 to manage the risks posed by their transportation. Cull buyers have to be registered, and both producers and cull buyers

must report transactions, which are consolidated.

As in the previous quarterly report, SAPA noted that reported sales from farms were far below the totals expected, "suggesting either that cull birds are being moved without the required permits, or that the permits are no longer being submitted to Silverpath Consulting". Silverpath has been contracted by the Poultry Disease Management Agency (PDMA) to manage the system.


The total of 1.04 million live birds sold in the first quarter of 2022 is slightly lower than the 1.22 million which were sold in the previous quarter. 

The poultry imports league table

Because bird flu bans now prohibit all European Union (EU) countries from exporting poultry to South Africa, Brazil is unchallenged as the leading supplier of poultry to this country. It has held that position since 2016, due to repeated bird flu outbreaks in Europe.

Import statistics for February 2022, the latest available, show Brazil's continued dominance. It supplied 77.7% of poultry imports that month, slightly below its 78.5% share in January. These figures show a sharp increase on Brazil's 66.6% share in 2021.

Both Argentina and Australia are taking advantage of the absence of EU supply. Argentina supplied 5.5% of last year's poultry imports and is now up to 8.2%, just behind the United States. Australia has risen from 0.5% in 2021 to 2.1% in February.

Australia has also suddenly emerged as a source of bone-in portions imported at extraordinarily low prices, even undercutting major producers such as Brazil and the United States. 



No better time to join SAPA

If you are not yet a member of SAPA, don't delay. All egg and broiler producers in South Africa can apply for membership, while suppliers to the industry can join as allied members, and gain access to SAPA's invaluable network of expertise. The membership fee for producers is R450 per year, plus an additional fee based on slaughter volumes for broilers or a statutory levy for eggs. Membership for small-scale farmers is R128 per year. The allied membership fee is R2 300 per month.

Call 011 795 9920 or email reception@sapoultry.co.za to request the application forms. Your application will be evaluated by the Egg or Broiler Board, and then ratified by the SAPA Board, after which your annual membership fee will be payable. The Board reserves the right to accept or reject any application at its discretion. 📄

NOTICES

The annual AVI Africa poultry conference was once again cancelled this year, due to ongoing uncertainties around Covid. The respective boards' annual general meetings which are traditionally held during the conference, will be taking place on 7 June in Johannesburg. SAPA has confirmed plans for the conference to resume in 2023, with dates to follow shortly. 📄



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Building blocks for farming success

A brand-new building division adds a whole new dimension to what Big Dutchman offers its customers

When it comes to increasing animal productivity and farm profitability, farmers in South Africa have relied on Big Dutchman since 1966. And now, the company is launching Big Dutchman Buildings, a brand-new division that grew from its passion to constantly find innovative ways to help Southern African farmers succeed.

With Big Dutchman Buildings on board, poultry farmers can now start broiler or egg production with built-in efficiencies from day one, to make

profitability achievable in a short timeframe.

According to sales director Scott Wiggill, the expert Big Dutchman Building team spend time getting to understand an individual client's objectives and then consider four aspects to ensure the delivery of a turnkey building that fulfills production expectations according to the particular timeframe and budget. "We first look at the farm's current activities, and then consider that

alongside the available space, the specific transport requirements and the long-term goals for the farm," he explains.

As part of the design process a 2D and a 3D model of the building is created with attention paid to all regulatory requirements, to make it easier for the farmer to secure the necessary permits for animal production.

Big Dutchman buildings are engineer-approved, strong and



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durable, hygienic and very practical. Once the site has been approved, a Big Dutchman building can be erected and fully fitted to cater for broilers or layer hens within six to eight weeks.

As is the case with all equipment supplied by Big Dutchman – from water- and feed-delivery systems to manure-treatment and -handling technology – Big Dutchman buildings have been designed with expert, animal-specific farming knowledge as a foundation.

“We know from experience how important farming knowledge is for the success of animal production,” explains Wiggill.

The building division will focus on the design and engineering of prefabricated livestock building structures, using the most modern building materials which allow for fast and easy assembly. The buildings are constructed from durable galvanised steel for longevity and protection against corrosion, with the latest polyurethane (PUR) or

polyisocyanurate (PIR) insulation products for energy-efficient building that complement the ventilation solutions that Big Dutchman provides. A sub roof containing a ceiling cavity insulated with 100mm glass wool is standard, as is design and supply of all wet works including flooring systems, which allows for effective cleaning and maintenance of hygiene.

Says Wiggill, “Our team handles the

‘Clients can rest assured that Big Dutchman takes care of every step of the process so that they can focus on their business’

project and construction management, with detailed planning and shipment to any destination. Clients can rest assured that every step of the process is taken care of, so that they can focus on their business.”


Big Dutchman South Africa recently completed its first locally sourced building at Weldhagen Eggs in Cullinan,



Gauteng, for a layer building housing 30 000 layers.

“The client reports that the hens are more productive and experience less stress in their Big Dutchman-equipped, animal-centric housing, which simplifies all the processes, from ventilation and feed and water delivery to manure removal,” reports Wiggill. Effective cleaning

can be done in a short space of time, which makes for better hygiene, as well as lower labour costs, he adds.

When working with Big Dutchman Buildings poultry farmers can bargain on receiving a professional service, that will deliver international building trends and concepts anywhere in Southern Africa. 

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MARKETS - THE KEY TO SUCCESS

Someone who buys from someone who sells is the foundation of trade. Without a market for your goods, you cannot have a business. From complex international trade agreements to chicken dust in informal settlements, the South African poultry industry participates across the entire market spectrum. By **Glenneis Kriel**

Images: Shutterstock



Exports have enabled Sovereign Foods to build a new processing plant at Kariega and massively expand its capacity

The South African poultry market is estimated to produce around 2 341 613 tons of chicken per year. Of that, 1 909 306t is produced by local producers and 432 307t imported. Small-scale farmers produce roughly 5% of local production.

The large integrated producers meet the needs of the large formal market, such as food retailers and quick-service restaurants, with fresh, frozen and processed meat products. While the bulk of their market is domestic, in line with the poultry industry master plan, the big guns are actively seeking export opportunities to grow their markets.

The poultry master plan aims to grow the local industry by developing the export market to SADC and other ACFTA countries, the EU and the Middle East. The goal is to export 3% to 5%



Spotlight on trade



Township shisanyamas represent an informal market segment which is currently undersupplied by direct-from-the-farm distribution

of production by 2023, and 7% to 10% by 2028.

South Africa already has export certificates in place for Namibia, Botswana and Eswatini, but access is restricted in terms of these countries' quota policy. According to Izaak Breitenbach, head of SAPA's Broiler Organisation, the expectation is for SACU arrangements to be smoothed to allow more exports to these regions.

South Africa is also theoretically able to export poultry meat and products to the EU, duty-free, in accordance with the economic partnership agreement, but has been unable to do so because of strict sanitary and phytosanitary requirements, related among others to diseases and chemical residues.

"South Africa would need to be accredited

as an exporter before it will be allowed to export meat to the EU. This would entail the development of approved infrastructure, tests and production protocols to show that we are able to comply with EU requirements. And after that, prospective exporting companies will have to undergo regular audits and tests to show compliance," Breitenbach explains.

A few countries, however, allow companies to register as exporters, and Sovereign Foods is one of the producers who has taken advantage of this route.

Chris Coombes, CEO of the Kariega, Eastern Cape-based company, tells how they have been exporting value-added and bespoke poultry products, such as fillets and breasts, to various African countries, Hong Kong, Qatar and the ▶

United Arab Emirates for the past six years.

"We focus on exporting high-value products, as it does not make sense to compete with South America on commodity bulk products, such as leg quarters," he says.

Exports have allowed Sovereign Foods to diversify its market risks and double its capacity at Kariega, through the building of a new processing facility, that can produce more than 2 000 tons of fully cooked and coated product per month.

The new plant produces a variety of boneless and bone-in, as well as breaded, crumbed and uncoated chicken products.

Developing the export market was an expensive exercise and did not happen overnight. Coombes explains that they invested heavily in the development of state-of-the-art facilities and ensuring that their whole supply chain all the way from their growers' farms comply with the high sanitary and phytosanitary demands of the import countries. As a result the quality of Sovereign's product is competitive with the best and largest producers globally.

"Our facilities are of the best in the world, which will allow us to export to any country," says Coombs.

There are many hoops to jump through before SA producers would be allowed to export chicken to the EU

CONTRACT GROWING FOR BIG COMPANIES

Many emerging farmers with big farming ambitions find that contract growing is a powerful and empowering way into the industry. For one thing, they don't have to find their own markets, which frees up time and energy to focus on production and learning the business.

Astral Foods has been empowering farmers for the past 21 years and over the past year, helped three farmers to secure funding from the Industrial Development Corporation (IDC) as part of the poultry master plan and is assisting another three farmers to do so at the moment.

Tumi Mokwene of Phetogo is one farmer who has grown his business thanks to an Astral Foods grower contract.

Mokwene's farming career started on the farm belonging to his uncle, who struggled to make ends meet even though he was farming with a thousand broilers. "All the money we made was reinvested into keeping the farm running, with hardly anything left to pay decent wages, never mind take the business forward," he says.

While studying public administration, Mokwene looked for a job at a commercial farm to see what these farmers were doing differently – a path that led to his employment at Kroon's Gourmet Chickens near Pretoria.

He became involved in every aspect of the farm, from the production of broilers to market deliveries. The Kroon Trust in 2008 bought Mokwene a broiler farm to help them meet the growing demand, which he then bought from the trust with the help of a Land Bank loan.





Spotlight on trade

Tumi Mokwene has built a thriving business by raising birds on contract for bigger companies



Experiencing the impact of dumping on the business first-hand, Mokwene became actively involved with SAPA in the fight against unfair and illegal trade. This journey led to his introduction to Chris Schutte, the CEO of Astral Foods, who offered him a contract to grow poultry on one of their premises near Lanseria.

Today, his business produces 98 000 broilers per six-week cycle for Kroon's abattoir and 255 000

broilers per cycle for Astral Foods. Astral has also helped Mokwene acquire funding from the IDC which will enable him to add a further 360 000 broilers to his capacity.

According to Astral's regional contract-grower manager, Basson Viljoen, growers who enter the programme are assisted with extensive support, which ranges from feed and day-old chick supplies to nutrition, production and veterinary services.

To qualify, however, growers have to comply with a long list of minimum requirements.

These include that they need to secure financing to ensure that they have sufficient working capital to cover production costs, approved environmental impact assessments for any new buildings, reliable access to water, a standby generator in case of power outages and a well-maintained road, among other specifics.

Spotlight on trade



There are estimated to be over 50 000 takeaway outlets in the informal sector

Small and smart

You don't have to be big to be successful, however. In addition to supplying niche markets (see "A market for niche poultry" on page 40), there is also opportunity in the massive informal market. Many emerging farmers find that they can make a decent living selling live broilers, for instance.

The market, however, is volatile and risky, and farmers sometimes find themselves with stock that erode their profits when not sold on time, while facing high biosecurity risks from having many different buyers visiting the farm.

GG Alcock, author of a book about the informal sector, called *Kasinomics*, says one solution is to partner with a township fast-food or street business.

These businesses compete with formal takeaway businesses, such as KFC, Nando's and McDonalds, but their unique selling point is that they offer food particularly adapted to the needs, tastes and lifestyles of their township and urban clients, from kotas and amaplati to shisanyama, the braais of the kasi.

Alcock estimates that there are more than 50 000 of these fast-food sellers and outlets, earning between R500 and R50 000 a day, depending on their popularity, in addition to 40 000 licenced taverns and shebeens that sell this type of food along with alcohol.

"The sector is often confused with the spaza sector, but is totally independent, representing a turnover in excess of R90 billion and employing more than 200 000 people. In addition, almost 90% of these traders are South African," he says.

Grilled chicken, generally a whole, half or quarter flatty, called chicken dust, usually sell for anything from R35 to R40 for chicken dust to R90 to R110 for a full chicken.

Alcock says the market is seriously under-supplied in direct-from-the-farm distribution, with entrepreneurs buying most of their chicken from retailers or wholesalers. This is a market opportunity producers should consider, he says: "Connecting with these fast-food entrepreneurs will help to reduce farmers' market and



Partnering with a township fast-food outlet can give farmers a sustainable business

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production risks.”

Kopano Mofokeng, founder and MD of meat business Kasi Convenience, agrees. After leaving formal employment in 2019, he started his meat-distribution business in his grandmother’s backroom in Soweto, with his grandfather’s 1989 Nissan bakkie and R15 000 from his personal savings. Today, he has a large meat business that sells primarily chicken in a 15km radius, which he wants to expand to the more than 20 other suburbs in the region, covering a total area of 200km².

Since 2019, the business has grown steadily, selling chicken worth R8,5 million during the 2021/2022 financial year, equalling roughly 263 tons of chicken. “At an average of 690kg per pallet, we sold 382 pallets for the year at an

average of 32 pallets or 22 tons per month,” he says.

They primarily buy their chicken from Sangiro Chicken, but have also sold product from Daybreak, Henwill Chicken and Sovereign Foods Cater Chicken procured through third parties.

“We have never managed to secure direct supply from the bigger producers because we don’t have a strong balance sheet and risk profile. The minimum order quantity for delivery with most poultry producers is two pallets, costing around R55 000, which a bootstrapping company like us cannot afford. Fortunately, Sangiro Chicken took a chance on us,” he says.

When Mofekeng started the business, he engaged with suppliers of a variety of consumer products, and realised that many of these

OPPORTUNITIES IN THE VALUE-ADDED MARKET

After acquiring the former Enterprise plant in Germiston, Country Bird Holdings (CBH) invested R150 million last year alone to transform this into a state-of-the-art chicken-processing plant.

Phil Tozer, marketing director at CBH, says: “We shed pork production at the facility in favour of halaal-certified value-added chicken, as poultry production is what we specialise in.”

The new plant will allow CBH to expand its value-added product range from the chicken patties, nuggets and strips which it already produces, in line with growing demand for convenience products in the retail market, and opportunities in the quick-service restaurant (QSR) and food-service sectors.

“We plan to produce new signature lines of foods that can be warmed and served almost

instantly. This sector was dominated by one retailer in the past, but now various others are expanding their ranges of convenience foods, increasing the opportunity,” says Tozer. “These value-added food products are also ideal for the hospitality market, for food prep at student residences and in hospitals.”

CBH is also in the process of attaining accreditation to export to the EU and Middle East, with

the idea of exporting fully cooked poultry to these markets.

Tozer says there is a lot of competition, but their edge lies in supplying the market with competitively priced, high-value products: “It counts in our favour that we have huge economies of scale and are a fully integrated operation with our own poultry production, abattoir and processing facilities, which helps to bring our costs down.”



There is high demand for convenience foods that take little preparation





Spotlight on trade

potential suppliers have never set foot in Soweto and many were afraid to do so.

"I offered tours of Soweto to sales and operations managers of these companies to show them the potential and workings of this market, but they were hesitant to come," he says. The fact that the market is largely cash driven is often another obstacle for these companies, he observes.

Mofokeng says that the fast-food merchants pay them in cash for the stock they order, after which they bank that cash and pay their suppliers via EFT. "We take out business insurance that covers stock and cash-in-transit robbery to mitigate these risks and in effect secure suppliers' stock and ensure payments."

While the market is price sensitive, Mofokeng points out that customers have a strong sense of

what a quality product is.

"In the flame-grilled chicken segment, merchants tend to shy away from buying whole chicken from formal wholesalers and retailers where product is generally sold per weight. Merchants prefer suppliers, like us, who fix the supply price, so they know exactly how much a bird costs," he says. To achieve this, he closely observes market prices and tries to be as competitive as possible.

Getting into this market can be difficult, he says, which is why Mofokeng invites suppliers to partner with intermediaries like him.

"Our business is the bridge between the township and the producers. Suppliers currently see us as a customer in that we buy product from them and resell it, but what we really want to become is a service provider that offers a



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route-to-market solution,” Mofokeng says.

He is currently in the process of raising venture capital to invest in their capacity: “We want to be in a position where we can receive stock in bulk, for instance 30 pallets at a time, store it properly and respond to customer demand.”

He feels that poultry producers would do well to support this market, not only in terms of product offerings, but also through branded equipment, training and so forth to help township merchants grow their businesses and optimise output: “This will strengthen merchants’ loyalty to the brands, which supports long-term sustainability.”

To contact Mofokeng for opportunities, email him on kopano@kasiconvenience.co.za.

Where do imports fit in?


In any domestic market there is space for regulated imports, and the same goes for the poultry market. Despite SAPA’s well-publicised campaigns to curtail unfair trade with tariffs and duties, Izaak Breitenbach emphasises that the industry is not against imports, as long as it is on an equal footing. “As one example, South Africa is heavily dependent on imported mechanically deboned meat, used in polonies and other processed products, because it is too expensive to produce locally,” he says. “Illegal and unfair trade, however, undercut profits and turnover and ultimately lead to a reduction in economic growth and job creation.”

He estimates that roughly 1 000 jobs are lost for every 10 000 tons of production sacrificed due to dumping or other illegal trade practices (see “Illegal trade: closing the loopholes”, page 12).

The removal or absence of import tariffs and duties has seriously backfired in some countries. South Africa lost 30% of its market to imports over the past decade, because of low profitability caused by dumping and illegal trade. This, despite the latest BFAP study ranking South Africa as the sixth most competitive broiler-producing industry in the world and South Africa outperforming the EU for the past 13 consecutive years.

Breitenbach points out that dumping annihilated Ghana’s thriving poultry industry. Whereas the country used to be self-sufficient 20 years ago, it only produces less than 5% of local consumption now, and broiler meat costs more per kilogram than steak does in South Africa.

The same trend is evident in other countries without import control, such as Mozambique and Angola; whereas those with good control, such as Namibia, Botswana, Zimbabwe, Malawi and Eswatini have thriving poultry industries that keep the price of local chicken affordable, according to Breitenbach.

The rich diversity of the South African poultry industry is a national asset that should be protected. There is room for many different players to meet the varied needs of consumers, and by protecting the local market, government also protects jobs, food security, economic growth and rural development. 

WHO GETS GOVERNMENT GRANTS?



Mooketsa Ramasodi, director general of the Department of Agriculture, Land Reform and Rural Development, explains that having a market is an important first step when farmers think of starting their own business, as this eliminates the risk of being stuck with a product at the end of a production cycle that eats into potential profits.

Market access therefore is an important consideration when farmers apply for government grants and funding, according to him.



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EXPLORING THE 'OTHER' POULTRY

A duck eats up to 11kg of feed in the 52 days it takes to reach slaughter weight



There are profits to be made in the quieter corners of the poultry market too... **Charmain Lines** investigates

Broiler and egg production are all about numbers that drive economies of scale. But there are also corners of the poultry market where volume is less important than satisfying unusual consumer preferences. Capon* anyone?

Free-range duck breast retails for around R210/kg in South Africa, which puts it out of reach of most household budgets. There is, however, enough of a demand for high quality, locally produced duck that niche farmers make a living raising them. The retail price is understandable when one considers that a duck eats between 10kg and 11kg of feed in the 52 days it takes to be big enough to slaughter out at around 2,3kg.

Vanessa Collocott is one of South Africa's

premier duck farmers, and raises free-range Pekin ducks on her 20ha smallholding, The Blue Orange Farm, in the KwaZulu-Natal Midlands. Her customers are mostly high-end restaurants and lodges, some as far afield as Cape Town.

"Lockdown completely killed the market so I actually stopped production for almost two years and just restarted with reduced volumes in January. I now average about 80 ducks a week and manage it very tightly. We also pasture-raise chickens, which complements the duck business and fills in the gaps when business is slower," she says. "It really is essential to do your homework before you embark on duck farming to ensure you have a market – I've basically had the same handful of customers in the nine years that I've



Niche markets

The average quail only gives about 200g of meat, but lays 300 tiny, tasty eggs a year



produced ducks and I know I can rely on them to purchase all I produce.”

South African duck farmers mostly work with Pekin ducks as their size and hardiness make them comparatively simple to farm with. They are also easily domesticated and as they are heavy and not good flyers, the risk of them clearing fences is low.

An interesting feature – and challenge – of duck farming is the relatively low hatching rate of about 70%. However, according to Karoo duck farmer Freddie Cross, the demand for duck eggs means that the unhatched eggs can be sold, which limits losses.

Slaughtering can also be tricky, as ducks are more difficult to pluck than chickens. Run-of-the-mill chicken abattoirs therefore do not slaughter ducks, which means accessing an abattoir can add significant transport costs to the production bill.

Collocott did a meat examiners’ course and set up her own registered abattoir on her farm for this very reason. “It is very important to get the timing right for slaughter, because you want to do it before the ducks’ pin feathers come in, which happen after about 49 days. If you get it wrong, all those pin feathers have to be manually removed, which is labour intensive,

and also spoils the appearance of the carcass.”

Ducks are not the only niche poultry product in the country. Even smaller and more specialised is quail farming – and not only because quails are on the opposite side of the weight spectrum to ducks. Slaughter weight differs between species, but the average bird only gives about 200g of meat.

As layers, however, quails are heavyweights – 300 tiny, tasty eggs per year is the norm – and there is also a healthy demand for quail feathers. These itty-bitty birds, therefore, pack a productivity punch second to almost no other in the poultry industry.

Linda Cronjé is the founder of Tweeter Quail Products and one of South Africa’s handful of quail producers. She says that quail is a perfect fit for health-conscious consumers: “Quail meat has almost no fat and is very nutritious, and the eggs are healthier than those laid by chickens or ducks.”

Cronjé raises Japanese quail on her farm in Polokwane. Although not a local species, Japanese quail is perfect for African conditions as they are easy to raise, don’t get ill and are extremely healthy birds.

One of the challenges in farming quail in South Africa is the lack of quail-specific feed, but Cronjé plans to fix that as part of her strategy to grow the local quail market. “What I am doing with Tweeter Quail Products is making quail much more accessible and less expensive so that the average South African consumer can eat it every day,” says Cronjé.

Niche poultry products are a reminder that there are also opportunities in meeting lesser-known consumer needs. Following the crowd is not the only way.

**A capon is a rooster that has been castrated before reaching sexual maturity and then fed a rich diet of milk or porridge. The lack of testosterone makes the meat more fatty, tender and flavourful than broiler meat, and far less gamey than rooster meat. Once a delicacy regularly featured on upper-class menus, capons are hard to find these days. Let us know if you know any producers! 📧*

Supply and demand in the fast-food market

Quick-service restaurants (QSRs) that meet the nation's demand for tasty chicken fast food are a significant market for poultry producers. Marketing executive **Colin Smith**, who manages this market for Astral Foods, shares some insights into what it takes



What does it entail to handle the client relationships with QSRs?

The QSR channel is fairly unique in terms of what it needs and requires from a potential supplier, and indeed calls for a dedicated role within the food industry. There are many elements to juggle to ensure reliability of on-time and in-full order supply – which are nonnegotiables in this arena – and client management is the overarching element to ensure this all goes accordingly to plan.

How long has Astral been a supplier to QSRs and what makes this a market segment to aspire to?

Astral has supplied various top QSR and restaurant brands for over 20 years. One of the benefits of this market segment is that such a supply agreement guarantees consistent volumes for a set period, which makes for ongoing reliable business. We've grown our QSR segment over the last three to four years and supply chicken to most of South Africa's key quick-service restaurant clients.

Are there big differences between the requirements of the QSR chains and the

product you deliver to, say, the retail market? What do QSRs specifically expect from a supplier?

The first thing to understand is that every QSR client has its own, very particular and specific requirements, and any potential supplier would need to be able to meet these. This includes particular cuts, marinades, portion sizes (which require specific bird size), and fresh or frozen format, to name but a few specific requirements. To be considered as a potential supplier, a producer would need the additional capacity to meet the client's volume demands, in exactly the right way for that QSR client.

This normally requires special lines and/or equipment so that the specific size/weight/uniformity standards can be maintained. QSR production also has very strict and specific food-safety and quality standards, which are audited on an ongoing basis to ensure that only top-quality product is served under the restaurant's brand.

Other requirements include animal- and bird-welfare protocols that must be maintained along with traceability measures that have to be in place. These standards aren't too different to those for any other channel (retail, for instance) that



Photograph: Sunshine Seeds / Shutterstock.com



MANAGING THE QSR CHANNEL



producers routinely adhere to. Having the ability to keep the supply going is crucial, as the client is hugely reliant on your product to operate their outlets. So “out of stock” is a no-no!

How have these requirements changed over the years? Are there notable trends in consumer taste that change what fast-food restaurants order from producers over time?

Today, QSR clients have the sophistication of “live” consumer data and sales trends that allow them to put demand plans in place that are very accurate and responsive to their customers’ needs. As a result changing tastes and popularity trends in serving sizes – say, family packs versus smaller individual servings – are catered for and yes, that affects what is ordered from suppliers. The Covid pandemic played a definite role, and the rise of online ordering and food-delivery services also impacted the market and provided good growth for the QSR brands. It’s worth noting that QSRs compete with other channels, such as ready-made meal offers supplied by retailers, for the consumer’s disposable spend.

Speaking of Covid, did the pandemic affect the demand from QSRs – did you have to scale down supply during the pandemic and was there any lasting effect?

The hard lockdown and its restrictions during April and May 2020 hit QSRs hard, which obviously impacted all suppliers, but we managed it until the market recovered. And it did, fairly quickly and in a phased fashion, with some QSR brands recovering faster than others due to employing aggressive marketing campaigns to regain lost sales.



Getting the contract to supply a QSR chain is good business, but comes with a long list of boxes to tick

Are things back to normal now? And did it just pick up where it left off, or did you see any lasting change in the product requirement as a result of the lockdowns?

Yes, thankfully, and most are showing good growth currently due to the new trends and opportunities that came out of the pandemic. There have been some changes to consumer buying trends and consumption habits that

capital investment in equipment, to developing the in-house ability to manufacture the specific products required by that particular client – these all form part of completing the puzzle. And that is what you do as a producer to secure your contractual supply agreements with your QSR clients.

‘Most QSRs are showing good growth due to the new trends and opportunities that came out of the pandemic’

are all part of the new phase we are in. The QSR channel is certainly far more dynamic and competitive today than it was before.

Astral has supply agreements with a number of the well-known restaurants. What did you need to do in terms of infrastructure development to be able to offer what these clients want?

With every QSR client come individual requirements, from infrastructure additions that require

In your opinion, is the QSR market one that smaller-scale producers can also play in? What would your advice be for a someone like that who wanted to enter this market?

It certainly could be a market for smaller producers who understand the contractual nature of the supply, and who are capable and have the capacity to meet the specifications of the particular product needed, also in terms of quality and food-safety protocols. It may seem daunting perhaps, but it’s not really different to any other food-product supply into the market! QSR is certainly a rewarding channel if it is professionally managed, and it’s a nice element to have as part of a client supply mix. 📺

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Lessons from an Aussie turkey-farming family



Growing turkeys has been a lifelong ambition for the Pace family of Australia. Learn about their journey to the top, their challenges, big ideas and passion for the industry.

Words: **Beverley Hadgraft**

Photographs: **Nick Cubbin**





Mary's father, Joseph Attard, with hens at Pendle Hill in the 1930s



The Pace family at Tony's farm in Bargo. Tony and Sarah in the back and Mary, Guido, Andrew with little Amelia, Jessica and Rita in the front

Retired second-generation farmer Mary Pace, 79, founded her turkey farm with husband Guido in the south-west of Sydney, the capital of the state of New South Wales (NSW), Australia. All three of her children have followed her into farming. This is her story:

My father, Joseph Attard, came to Australia from Gozo, a little island off Malta in the Mediterranean. He was only 20, but Gozo was a poor place with no education and he wanted a better life.

He cut sugar cane in the state of Queensland for five years, then came to Pendle Hill, NSW, to start an egg farm. He grew lucerne and mixed his own feed and also had a tractor and ploughed for people who had market gardens. He was a very hard worker. I'd help him collect and pack the eggs.

When I married my husband, Guido, in 1963, we both worked in factories but people kept asking why we didn't get a farm ourselves, so in 1972 we bought two hectares in West Hoxton, Greater Sydney, from a lovely English couple who had a shed full of rabbits. We lived with them for a month and they showed us what to do, but after a year we switched to growing chickens

for a contractor instead.

It was very hard. Everything was second-hand and the company wasn't very good. When the chickens were taken off to the processing plant, Guido had to follow to make sure none of our chickens were sold on the way or we'd get poor weights and be paid very badly, if at all.

Guido had to continue working in the factory to make ends meet, so in the end we pulled out. However, we then saw that the big poultry company Tegel [since bought out by Ingham's] was advertising for new turkey farmers. We had nothing to lose, so went with them and never looked back.

We bought a new farm in Catherine Field in Sydney's south-west, and put up a new house and sheds, and Tegel was very good. They had a great service manager, Bob Love, and he was terrific. He'd come out when the turkeys were little and although we never had sickness sometimes you might lose a few, so he'd take them to a vet to make sure everything was okay. He'd let you know what was coming and when they'd be taken away.

We thought we were going to lose our first batch as they arrived in a heat-wave. It was 45°C for five days and we

were hosing the sides of the sheds down and putting big ice pieces in the water. Luckily a cool change came through.

Ours was only a small farm compared with today's, but we'd still raise 28 000 turkeys at a time. One morning, one managed to put its head through a gap in the sliding door and open it. I had to keep the kids home from school so they could help me shoo them all back in. That was terrible.

We had three children, Tony, Pauline and Stephen. I wanted them to have a good education and get jobs as solicitors or accountants but they're all turkey growers and I'm proud of what they've achieved.

My grandson Andrew, 32, is a fourth-generation grower but he's been pretending he's a farmer since he was a baby. It was always in him.

There are many differences in the way my children farm and the way we did. They have a lot more paperwork and the equipment and sheds are more modern and easier to manage.

Stephen and Pauline would like to farm down here but instead they've got six sheds each in Marulan [about 2 hours away]. You need more land now so the neighbours don't complain. They don't like farms next to them. ▶



Tony Pace's
Yanderra Turkey
Farm at Bargo

Tony Pace, 56, is confident that no-one in Australia owns a bigger turkey farm than him. He has four children, Andrew, Mark, Sarah and Alison and, apart from Mark, they all love raising turkeys. He continues the story:

When I was eight, I told my dad, "One day I'm going to have the biggest turkey farm in Australia." He told me to stop talking rubbish, but today I reckon I do have the biggest turkey farm in Australia, and probably in the Southern Hemisphere.

At school my favourite subject was commerce and I had dreams of being a solicitor or accountant. However after the careers adviser told me I wouldn't graduate until I was 26, I thought, there's no way I want to be 26 with no money. By the time I'm 26 I want to own two properties.

I started off raising chickens. Back then if you had 60 000 birds it was considered a big farm and you'd be making a good living. I was renting four

farms and had 200 000 birds. I did that for about four years and then, when I was 22, I bought one of the farms for A\$336 000. Today a decent farm like that would cost A\$5 million plus [around R55 million].

I carried on growing chickens and then there was an opening to grow turkeys. At the time I had three little sheds on 2 hectares at Leppington but

'My dad took 20 weeks to grow a 13kg bird. Now they come onto the farm at one day old weighing 65g and within 18 weeks they are pushing 18-20kg. That's 100% down to genetics' - Tony Pace

I knew I wanted to get bigger so we bought 18 hectares a bit further out of Sydney at Bargo. I have eight sheds there now.

While I was building Yanderra Farm at Bargo, Ingham's let me run both that and Leppington for two years to help me get on my feet. I then had to sell Leppington because there were

biosecurity issues with me running between farms.

I've seen dramatic changes in turkey growing. My dad took 20 weeks to grow a 13kg bird. Now they come onto the farm at one day old weighing 65g, and within 18 weeks they're pushing 18 to 20kg. That's 100% down to genetics.

The technology has changed things, too. We used to need hand winches to change the ventilation. Today you couldn't manage a farm the size of mine with hand winches. You'd need four people to open and close up. Instead, the sheds are controlled by computer 24/7, and my wife, Rita, and I can run them on our own.

That temperature control is crucial because margins are so fine. If it's really cold and the birds are freezing they're going to eat and waste feed just to keep warm. However, the technology does mean the investment is higher.

The cost of building sheds has increased fivefold and the cost of land has also increased. In 20 or 30 years' time there won't be any more farms round here. They'll all be sold to developers.

My wife comes from a family of market gardeners and has Maltese heritage. She's ambitious like me. Our son Andrew has gone into turkeys and daughters Sarah and Alison love turkey farming, too, but aren't in the business yet. Alison looks after the farm when I go away.

When I met Andrew's wife, Jessica, I thought she looked like a model. I told him, "She's good-looking but do you think she'll handle it?" He said, "She will," and she does. She's knee-deep in manure some days and couldn't care less. She's surprised me a lot.

This is my 38th year as a farmer. I've seen a lot of people without farming



backgrounds come into the industry and they rarely last. They can't handle the seven-day week and the smell – I love the smell – and they take a while to come round to being told by the processor how to run their farm.

Well, you have to be told. It's your farm, but the birds belong to the company [Ingham's], and if the boss

says the birds need this or that, you do what they say. I think Maltese people must be good at understanding that. It's amazing how many of us raise poultry. Of the 20 people raising turkeys for Ingham's, 19 are Maltese. Five are my family – my brother, sister, son and two cousins all raise turkeys for Ingham's. Everyone who

work for Ingham's is from a farming background.

Funnily enough, we only ate our first Christmas turkey four years ago. We loved it. It's not that turkeys are pets but they follow you all around all day in the shed. They're very inquisitive. I can't eat what I grow!



Andrew Pace
checking on the
turkeys at his farm

From the age of four, Andrew Pace, 32, was asking for his own turkey grower's contract. His wish came true, and he now farms in Greater Sydney alongside his wife, Jessica. He picks up the story:

Growing up, turkey farming was a way of life. Mum and Dad are turkey growers, my grandfather was still farming and Dad's brother and sister were both turkey growers.

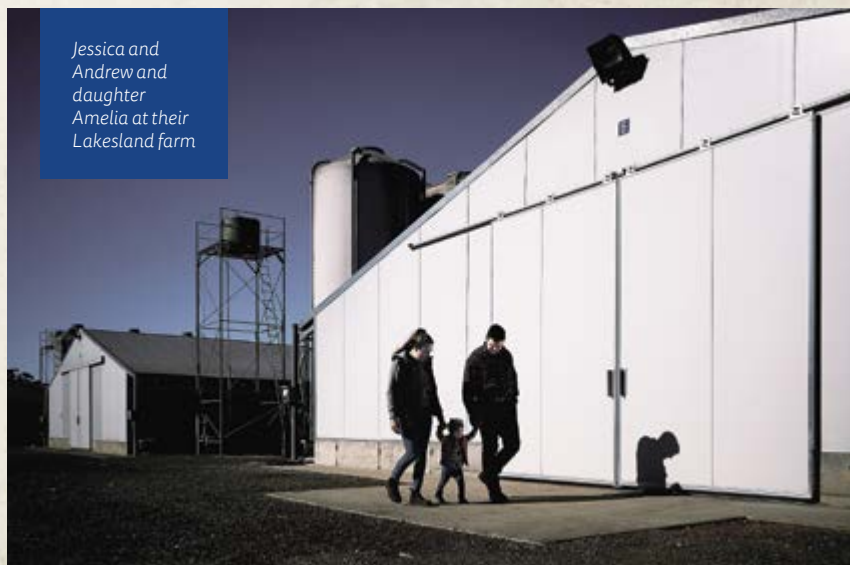
It wasn't presumed I'd do the same, but I took a massive liking to it from day dot. I loved seeing the first young poults coming in, loved getting them off to a good start, I just loved working with the birds. I was like Dad's shadow and would do anything to help.

I was only four when I showed the Ingham's service manager, Bob Love, the farm I was making in my sandpit and asked, "Will I get a contract when I grow up?"

I've been with them for six years now so that means, combined, our three generations have had close to 70 years of service for the same company. Grandfather grew for them for 30 years and Mum and Dad have been growing with them for 38 years.

Turkey farming has changed a lot over the generations. My grandfather had a two-shed farm with 3 000sqm of growing area. That was considered average, but today you wouldn't make a living out of a farm that size, you need 9 000-10000sqm to make it viable.

Although I always had the



Jessica and
Andrew and
daughter
Amelia at their
Lakesland farm



Andrew checks the ventilation controls in a shed



ambition to have my own farm and be the best turkey grower possible, I needed money behind me. I had a passion for electrical work, so I did my apprenticeship as an electrician. I worked day and night – literally – for 10 years and saved the deposit. I bought a block of land and then the place I've got now in Lakesland [about an hour outside of Sydney] came up. It already had a contract with Ingham's, so I could buy it as a going concern.

It was a big jump for me but Ingham's was very supportive and reassuring that the future of turkeys is strong and I feel confident growing for them. Their service managers have always been great; I can ring and talk to them any time. They don't take any short cuts and they're always inspecting your sheds and ensuring you're doing the right thing, which is good. I'm really proud to be continuing the family

tradition and am happy both my parents and grandparents were around to see it.

We're a six-shed farm so Ingham's typically delivers two sheds of poults at a time over a week – about 55 000 to 60 000 in all. We raise them for 18 weeks and then we clean out and have


'I'm really proud to be continuing the family tradition and am happy both my parents and grandparents were around to see it' - Andrew Pace

a two- to five-week break before they send a new lot of birds.

My wife, Jessica, trained as an interior designer but I always made it clear turkey growing was where I was heading. She's taken to it like a duck to water; I couldn't do it without her. Now that we have a young daughter, Amelia,

she appreciates the fact she can work from home and raise a family.

Dad and I are very competitive people but he's given me lots of guidance and tips. The best advice though was not to let my debt get to me. Sometimes it seems there's no light at the end of the tunnel but he encourages me that it will get easier as I keep going, and it does.

I've seen lots of poultry farms all over the state and there are some nice ones but I reckon Dad's is one of the nicest. He'd have to be one of the fussiest growers I know and I'm super fussy, just like him. After we've cleaned the sheds between batches I want to be able to eat off the floor." 

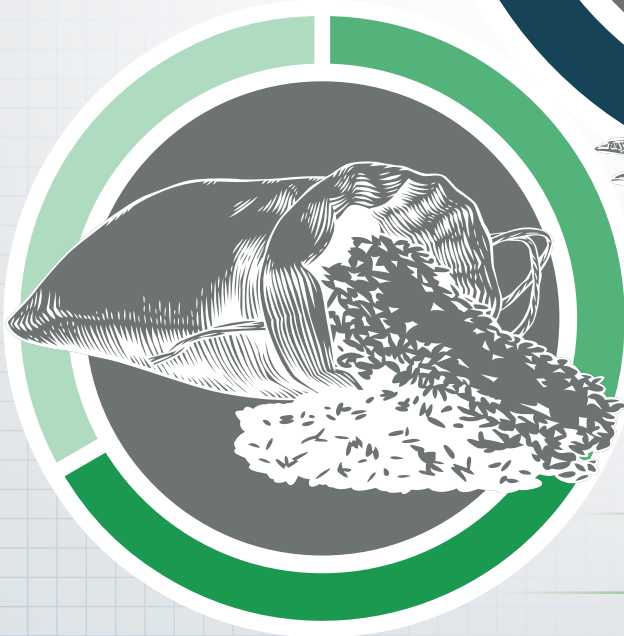
The story first appeared in The Farmer magazine, a publication from NSW Farmers Association.



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FARMERS' WISDOM

Limpopo entrepreneur **Mongane Kubjane** shares his advice on securing a market, the benefits of joining SAPA, and how to achieve success

In praise of a strong team

I saw an opportunity when out shopping one day at our local Jane Furse Plaza shopping centre – the poultry section was empty. I realised that in our area, but also in rural areas in general, there is a shortage of locally produced, fresh, quality poultry products. That's where the idea for Mannini Poultry was born.

Our homework showed that there was a market for locally produced eggs and we started with 300 layer hens in 2019. Today we have 2 000 layers that lay 52 000 eggs per month, which we sell to five supermarkets in the area. Our business was totally self-funded, and we invest our profits back into the business. The demand for our eggs has grown steadily and we are now in the process of expanding.

I joined SAPA as a member two years ago. It's something I recommend to other farmers – the association provides such valuable information to us. As a SAPA member I receive a first-hand overview of the global and the South African state of our industry. This information helps us in decision-making in our business.

Aside from that, my best advice to new farmers is to build a strong team around you – people who share your vision. No-one succeeds in business alone, and those who try will lose to a great team all the time. Start small, find your market, and grow as demand increases. 📈



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1. Callender ME and Jeffers TK (1980). Anticoccidial Combinations Comprising Nicarbazin and the Polyether Antibiotics. US Patent 4,218,438, pp1-12.

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A rainbow nation of chicken

Illustration **Jason Bronkhorst**

Which piece of the bird is your favourite? The hotly contested Sunday roast chicken of his childhood is where it all started, writes **Tshepo Mogale**

A Sunday roast chicken was always a favourite in my home growing up. Carving the chicken was the job of the Head of House or the eldest of the children. The chicken piece distribution was always a hotly contested political issue, until we learnt the hierarchy of the pieces.

The juicy pieces were reserved for the adults. The Head of the House would get the drumstick and a thigh. The Mom of the House would get the wings. The firstborn would get the other thigh. The less desirable breast pieces would be for the kids. The dry white breast was even called the boys' meat, so disrespected that it was reserved for the uncircumcised boys. This is how I have always known the chicken pieces to be.

In the 1990s when South Africa became a more culturally blended society, as the rainbow children of the Mandela era we started doing sleepovers with friends from other races. I was shocked to learn that in Caucasian households, the grotesquely large, drier than Sauvignon Blanc, chicken breast was the piece of choice.

I wonder why the pieces of chicken

preferred by black people are called dark meat and those preferred by white folk is called white meat.

In one of my first sleepovers I had my feelings accidentally hurt when the mom asked if I would like dark meat. I don't even know why my feelings were hurt; we were in an era of walking on racial eggshells and I took it as a racial jab. I was learning English. This was pre-Google times, Yahoo did not have all the answers.

There are many questions to ask on this issue. The first one is, why do Caucasian people love the chicken breast so much? This big dry chunk of chest muscle is so desirable to pale-skinned shoppers that for a long time, it was the only portion that you could buy deboned and skinless.

The second question is, why do black people love chicken wings so much? As my uncle always says, chicken wings are to a black person what a Lacoste golf shirt is to a coloured person...

So let's explore the darker side of the chicken pieces, aka the "binnegoede". But before we peer into the "binnegoede", let's consider

the "buitegoede". Fondly known as walkie talkies, the chicken feet are the "walkie" and chicken head the "talkie". That being said, I've never heard any black person refer to it as a walkie talkie; I have also never seen any white person consume any part of the walkie talkie. The walkie talkie is *Fear Factor* territory. Personally, I have consumed the walkie, but the talkie is too extreme for me. Oh, the questions that come up. What about the eyes? Is that red chicken mohawk/beard thing chewy or, heaven forbid, crispy? Just, eeeuuw!

I have started seeing all sorts of chicken-feet stews, curries and the like on social media*... #chickenfeet #africanfood. In my life I never thought that chicken feet would have an unintended influencer campaign. I got influenced and made a chicken-feet curry myself. I have two children, one black and one mixed race. My black child loved it; the white half of my mixed child found the chicken feet too extreme.

I gave the experience a mixed review. The curry was delicious, the palm of the foot was delicious. The

*Turn to page 64 for our own recipe for delicious Walkie Broth

MY CHICKEN LIFE

shin was edible. Problem was the fingers. It felt like I was licking someone's fingers. It felt like a bizarre KFC not so good finger-licking experience.

So, on to the "binnegoede". The chicken liver will always cross cultures and be a matter of personal preference. When I heard chicken livers being described as creamy on the cooking show *Come Dine With Me*, it challenged my long-held assumption that anything "binnegoede"-related makes Caucasian people as uncomfortable as an unscripted Julius Malema monologue.

Then there are the familiar but unfamiliar bits called the chicken gizzards – you might have seen them, and wondered, what the hell are gizzards? Well, it turns out it's the stomach of the chicken...



a very chewy part of the bird. I think the gizzards should be rebranded and sold as chicken bubblegum. It will be a way for gizzards to reach a broader market, maybe even make it into school tuckshops, and we know how lucrative that is.

At a number of taxi ranks, I have seen chicken intestines, braaied on a sosatie stick and sold as a walking snack. Since I've seen this South African version of a corn dog exclusively at taxi ranks, there is no debate as to what part of the population fancies this bit of the "binnegoede". In the Eastern Cape I once saw something at a store that I've never seen anywhere else: chicken buttocks for sale. The store owner had found a way to get maximum value out of a chicken: deep-fried chicken butts, no less.

This blew my mind. There was a queue of people lining up for the chicken buttocks. I hung around, curious to see how the butts were consumed, and learnt something new. They were consumed as a snack, served in a plastic and eaten as if it were popcorn. In Setswana they say, to travel is to see.

Finally, the ultimate cultural marker is the way people approach chicken bones. The chicken bone etiquette, if you will. You give yourself away by how far you are willing to go to get maximum taste out of the piece of chicken on your plate.

There is no easier way to see where on the nation's rainbow you fit, than to look at how you eat the drumette, the big bone of the wing.

My Caucasian family will leave bits of perfectly good meat on the bone. I suppose the coloured and Indian folks will be in between, leaving some skin on the bone.

Black people, on special occasions (first dates, wedding days, when there are guests of other cultures) will leave a clean, dry bone behind.

Black people, when there are no people of other cultures around, will not leave much at all, barely a powdery pile of what looks like crushed eggshells.

It's all a question of taste, they say, and luckily there's a piece of chicken for everyone at the foot of the rainbow. 🍷



Tshepo Mogale is a comedian best known for the TV shows *Pure Monate Show* on SABC1 and *Laugh Out Loud* on M-Net. He is now a sales and operations manager for a finance house. Follow him on Twitter/IG: [@ComicalTshepo](#)

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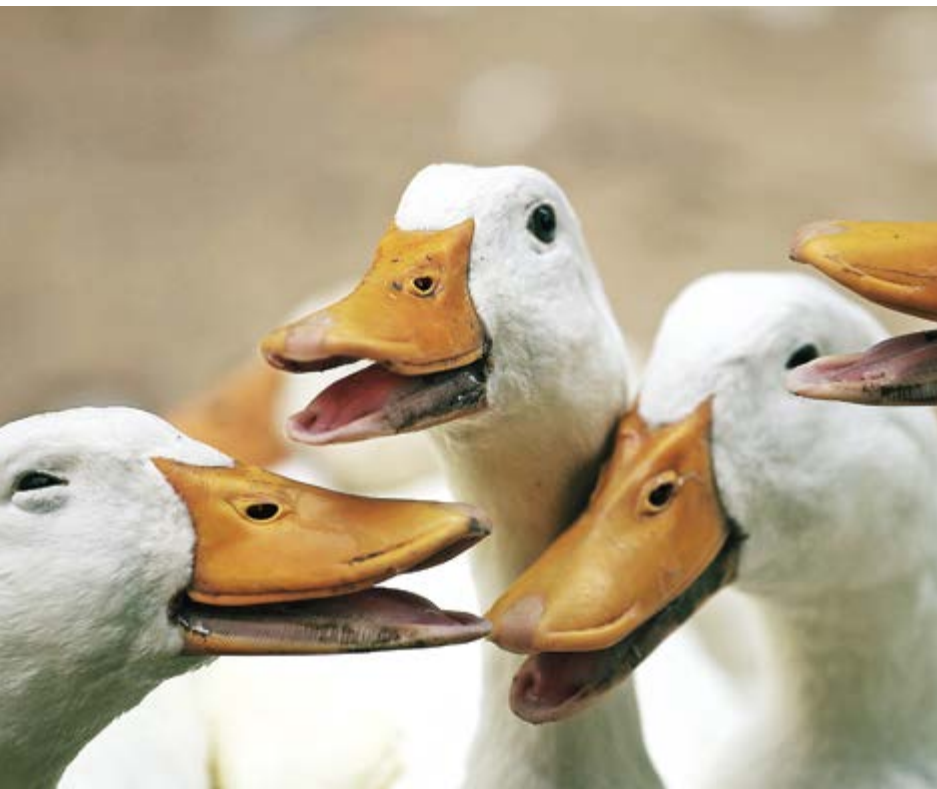


ON THE WIRES

The hottest in global poultry news, collected in one place for your convenience

Compiled by **Charmain Lines**

Taiwan takes duck welfare seriously



Taiwan has become the first country in the world to ban cages for egg-laying ducks. While most of the country's 2.16 million laying ducks are not housed in cages, egg farmers have increasingly started to introduce cages.

The country produces between 400 and 500 million eggs per year on around 400 farms, making the Taiwanese industry worth more than USD60 million per year.

Duck eggs are popular in Taiwan and are typically consumed pickled or

salted, or in processed food products such as mooncakes. A large proportion of the country's production is exported to the US, mainly the state of California, where the sale of cage eggs, duck eggs included, became illegal on 1 January 2022.

Ducks depend on water to maintain their eye, bill and foot health, to keep their plumage in good condition and to regulate their body temperature. Being cooped up in cages is therefore extremely damaging to ducks' health and welfare. 🦆

HPAI vaccine news



Two research institutions recently announced promising results in the development of vaccines against HPAI.

The UK's Pirbright Institute has developed a targeted antigen delivery vaccine that could protect chicks at hatch by creating a protective immune response. Importantly, the vaccine is not affected by maternal antibodies. While these antibodies help boost the immunity of chicks, they often interfere with vaccine effectiveness.

The active ingredient in conventional vaccines are deactivated and thus noninfectious viruses. The active ingredient in *this* vaccine is protein derived from a component of the same virus. At no stage is it infectious and the technology is a more targeted approach to immunisation, while also less costly to make than earlier bird-flu vaccines.

Meanwhile, in the US, at the University of Wisconsin, researchers have developed a mosaic nanovaccine touted to protect birds against various strains of HPAI. To create the mosaic vaccine, the researchers collected DNA sequencing data from nearly 20 000 strains of avian influenza.

This helped them select the antibodies that are most likely to ensure that the resulting vaccine protects birds against several strains of the virus. 🦆


Growing in eggshells



The saying is that you have to break eggs to make an omelette, but researchers at Brazil's Federal University of Paraná (UFPR) are breaking eggs to make crops grow. More accurately, they are turning eggshells into environmentally friendly fertiliser.

According to the university, almost six million tons of eggshells are produced worldwide annually. By finding a use for this waste product, which contains loads of calcium, an extra value stream can be created for egg farmers. In addition, the technique developed at UFPR could do much to help alleviate worldwide fertiliser shortages and also drive prices down.

The production process is simple. Eggshells are placed in a high-energy ball mill, where thermal energy and friction cause the eggshell components to react and generate phosphorus, calcium and potassium, three essential minerals for the development of crops.


The researchers have applied to Brazil's National Institute of Industrial Property to register the new fertiliser. 

Poultry to the rescue

A company that has suffered tremendous losses itself has mounted a relief mission in Ukraine.

MHP, the country's largest poultry producer, has not only restarted its exports – by road instead of sea – but is also providing humanitarian aid to besieged cities.

MHP is giving away as many as 330 tons of chicken every day to feed thousands of civilians in Kyiv, Kharkiv and Mariupol. In many instances, the food is delivered on the outskirts of the cities as only Red Cross workers can safely enter the war zones.

In exchange for transporting chicken, MHP has provided fuel to the Red Cross and also helped transporting women and children out of the most dangerous zones. 



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Scaling up a layer operation

Do you need more birds to ensure better profits? **Justine de Winnaar** advises



"I have been producing eggs for a while now, with 300 layers, but I just can't get to a profitable stage. How do I expand so that I don't operate at a loss?"
Nandipha, via Twitter

Very often it's the dream that once you expand things will get easier, but unfortunately this is not always true! You will have even more challenges than you currently do. Economies of scale are a reality, and for smaller operators who can't negotiate bulk discounts for any of the inputs needed, everything works out more expensive and makes your margins smaller. Having said that, if you aren't getting things right in your scaled-down business, it is very likely that you won't get it right with a bigger version of your business, and here you are likely to have a far greater loss than the loss you were

making with the small business.

There are so many ingredients that you need to get right in order to make a success of your venture, but the three key elements are 1) management, 2) your biggest input cost and 3) your market.

Firstly, a dynamic, adaptable individual who pays attention to detail can make a success of any venture, be it poultry farming or managing a restaurant! If you want to make a success of your farm, give it all you've got. If you give little interest to your business, don't expect big returns – you get out what you put in.

Secondly, feed, feed, feed! There are a multitude of methods that can be used to reduce feed costs, but I'd like to focus on the location of your farm, in terms of its distance from the feed mill.

If your farm is very remote you'll be spending a large portion of your profit on the transport of all of your inputs – not only feed – to your farm. Unless you can split your feed transport cost with neighbouring farmers, or can accommodate a bulk delivery of feed, expanding your operation under your current circumstances is not going to give you the result you desire. The fuel price is also on an upward trajectory, and it is certain to increase multiple times this year, which will further affect your profitability.

The final critical ingredient is your market. Unless the market can accept supply of more of your product, expansion of your business should not be considered. So do your homework in your area and locate customers who will buy all the eggs that you produce, and more, before you even think about expanding.

If you can fulfil each of these three areas, expanding your business should bring you the additional return that you strive for. Good luck! 🍀

Justine de Winnaar has a masters degree in poultry science and has managed a breeder operation as well as working in the feed industry as a technical advisor and nutritionist. At Leading Edge Poultry Software she writes the Subsistence and Small Commercial Farmer Report for the South African Poultry Association.

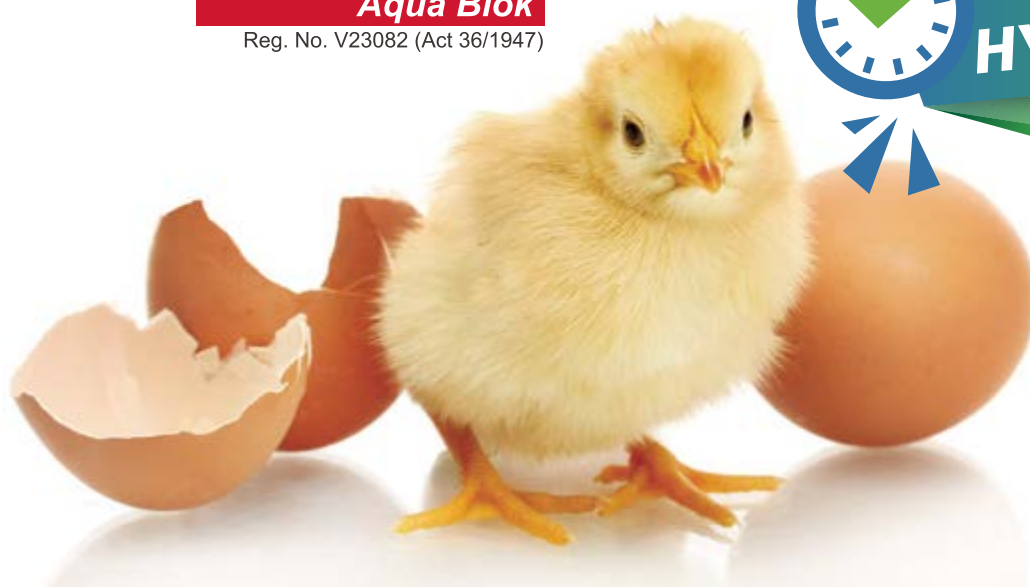
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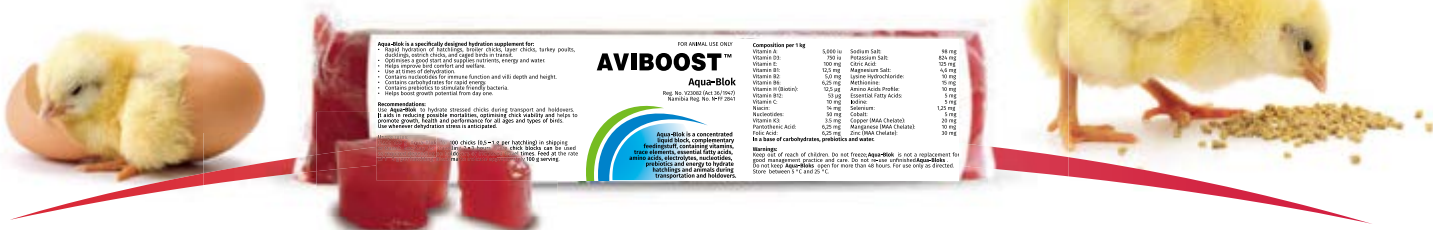
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- Nutrients, energy and water supplementation
- Improvement of the bird's comfort and welfare
- Development of immune function and intestinal cells
- Boosting growth potential from day one



Aqua-Blok is a specifically designed hydration supplement for:

- Rapid hydration of hatchlings, broiler chicks, layer chicks, turkey poults, ducklings, ostrich chicks, and caged birds in transit
- Nutrients, energy and water supplementation
- Improvement of the bird's comfort and welfare
- Development of immune function and intestinal cells
- Boosting growth potential from day one

Recommendations:

- Apply Aqua-Blok to the water intake of the birds during transport and holdovers
- It aids in reducing possible dehydration, restoring fluid balance and helps to promote growth, health and performance for all ages and types of birds
- Use whenever dehydration stress is anticipated

For broilers: 0.5-1.0 ml per 100g of body weight

For layer chicks: 0.5-1.0 ml per 100g of body weight

For turkey poults: 0.5-1.0 ml per 100g of body weight

For ducklings: 0.5-1.0 ml per 100g of body weight

For ostrich chicks: 0.5-1.0 ml per 100g of body weight

For quails: 0.5-1.0 ml per 100g of body weight

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Vitamin K 100 mg Iron 100 mg

Vitamin C 100 mg Copper 100 mg

Vitamin D 100 mg Selenium 100 mg

Vitamin H 100 mg Chromium 100 mg

Vitamin I 100 mg Molybdenum 100 mg

Vitamin J 100 mg Nickel 100 mg

Vitamin L 100 mg Cobalt 100 mg

Vitamin M 100 mg Vanadium 100 mg

Vitamin N 100 mg Silicon 100 mg

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Vitamin GY 100 mg Boron 100 mg

Vitamin GZ 100 mg Fluorine 100 mg

Vitamin HA 100 mg Iodine 100 mg

Vitamin HB 100 mg Manganese 100 mg

Vitamin HC 100 mg Zinc 100 mg

Vitamin HD 100 mg Selenium 100 mg

Vitamin HE 100 mg Chromium 100 mg

Vitamin HF 100 mg Molybdenum 100 mg

Vitamin HG 100 mg Nickel 100 mg

Vitamin HH 100 mg Cobalt 100 mg

Vitamin HI 100 mg Vanadium 100 mg

Vitamin HJ 100 mg Silicon 100 mg

Vitamin HK 100 mg Boron 100 mg

Vitamin HL 100 mg Fluorine 100 mg

Vitamin HM 100 mg Iodine 100 mg

Vitamin HN 100 mg Manganese 100 mg

Vitamin HO 100 mg Zinc 100 mg

Vitamin HP 100 mg Selenium 100 mg

Vitamin HQ 100 mg Chromium 100 mg

Vitamin HR 100 mg Molybdenum 100 mg

Vitamin HS



Using trends to plan for sustainable farming

Finding a market-related price point for your product is a challenge for any farmer, and the more you know about price trends, the more able you are to find that sweet spot, writes

Dr Johnny van der Merwe



With any agricultural product, correct pricing is essential for business success. By looking at international and national trends, and analysing the factors that influence them, AMT is able to provide producers with an educated guess about likely price movements, which allows farmers to plan better and farm more sustainably.

When it comes to chicken, international prices, import prices and the exchange rate each play a big role in establishing a market-related price in this hugely competitive industry. The profitability of a poultry operation is further directly influenced by international price drivers in the grain sector.

But the price of chicken is also influenced by the prices of mutton, beef and pork and analysts who look at price trends to predict patterns look wider than events within national borders, and also do not look at different commodities in isolation.

Let us look at a few examples to explain the principle.

Beef: A recent increase in the supply of weaners has placed local prices under pressure. However, consumer demand remains healthy despite a decrease in buying power. As a result, slaughter prices have increased sharply to a level we expect will be maintained over the next few months.

Mutton: We have seen a similar strong demand for mutton. This combined with price seasonality and extremely wet weather in large production areas, which made it difficult for sheep to gain weight and resulted in a downward supply trend, to push prices up higher and faster than expected.

Grain: As maize farmers in the US prepare to plant,

weather conditions in that part of the world are moving into focus as a major price driver. The prevailing drier-than-usual conditions are lifting grain prices at a time when developments in other countries are putting international grain stocks under pressure. These include yields in South America that were lower than expected and, of course, the likely impact on production of the war in Ukraine. As always, the massive Chinese market is a factor. Covid lockdowns and a slower-than-expected growth rate have jointly resulted in lower grain imports. However, there are signs of a reversal of Chinese fortunes, which will result in a spike in demand – and prices.

The takeout for South African consumers and chicken producers is that grain prices can be expected to remain high, especially against the backdrop of a worsening ZAR/USD exchange rate in recent weeks.

Higher meat prices are spilling over to chicken and pork too – both of which are trending upwards currently.

Ultimately, knowledge of your market and the current market trends is essential for effective production planning. Even more so in times such as these, when input costs are high and there are no guarantees that commodity prices will remain as strong as they have been. We may very well be facing a tough year or two for profitability, and knowledge and planning is extremely important to ensure you can keep farming sustainably. 📈

Dr Johnny van der Merwe is an agricultural economist at AMT, which specialises in the analysis and forecasting of national as well as regional agricultural industry and market information. Contact Dr Van der Merwe on johnny@amtrends.co.za

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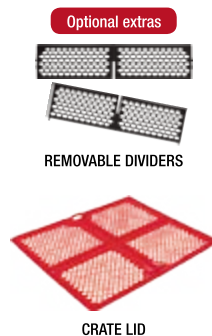
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A 5 HR. PROCESS

BE PREPARED

 10 CHICKEN FEET	 4 CHICKEN WINGS	 1 ONION HALVED	 2 CARROTS CHOPPED	 2 CELERY RIBS	 AROMATICS 2 GARLIC CLOVES 1 BAY LEAF 10 PEPPERCORNS 1 TBSP. TURMERIC 1 TBSP. APPLE CIDER VINEGAR
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PLACE CHICKEN & VEG. IN A PAN
ROAST FOR 40 MINS.
@180°

IN A LARGE STOCKPOT,
COMBINE ROASTED CHICKEN &
VEGETABLES WITH AROMATICS.
COVER GENEROUSLY WITH WATER.
& BRING TO A ROLLING BOIL.

TURN DOWN HEAT, COVER, & SIMMER
FOR 4 HRS; REGULARLY
SKIM SURFACE
FROTH

AFTER 4 HRS
REMOVE LID
& SIMMER
GENTLY FOR
ANOTHER HOUR.

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