

Broiler Industry Stats Summary for 2025

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1. INDUSTRY STATISTICS

1.1. Price comparison of protein sources

The weighted average producer price for total broiler sales realisation (less all discounts, rebates and secondary distribution) for the year 2025 was R33.66/kg; a 5.7% annual increase (Table 1). The producer prices and the annual percentage changes are shown in Figure 1 (source: AMT, SAPA). The supply of beef was constrained owing to severe foot-and-mouth disease outbreaks, resulting in price escalations.

Table 1: Broiler pricing (R/kg)

Product	2024	2025	% change
Fresh	40.27	41.69	3.5
Frozen	30.34	32.18	6.1
Total	**31.83**	**33.66**	**5.7**
IQF mixed portions	30.28	32.30	6.7
Whole frozen	34.63	36.91	6.6
Frozen sundry	14.75	15.38	4.3

IQF = individually quick frozen

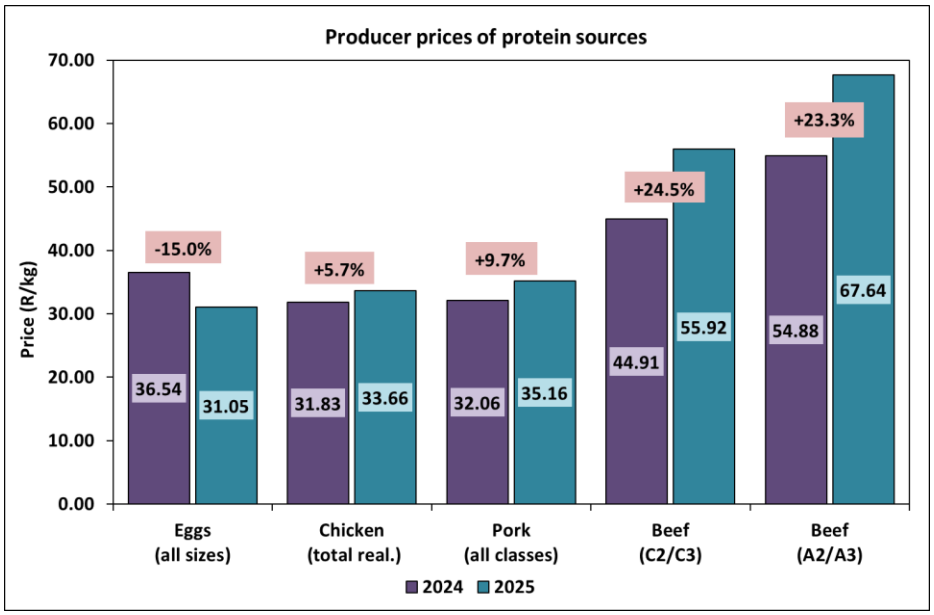


Figure 1: Producer prices of different protein sources

1.2. International price competitiveness

According to the United States Department of Agriculture (USDA), the average price in the northeast region of the USA for leg quarters was 52.13c/lb (a 4.3% annual increase) and for deboned and skinless breasts 184.93c/lb (+15.9%). Using the average exchange rate of R17.88 to the US dollar for the year 2025, the leg quarter price equates to R20.55/kg and the deboned, skinless breast price to R72.90/kg. The South African price for fresh and frozen leg quarters was R41.10/kg and R37.67/kg respectively, and for fresh and frozen filleted breast R55.57/kg and R50.99/kg respectively.

Figure 2 shows the trends in three of the portion prices. Average prices (c/lb) for the various portions are given in Table 2.

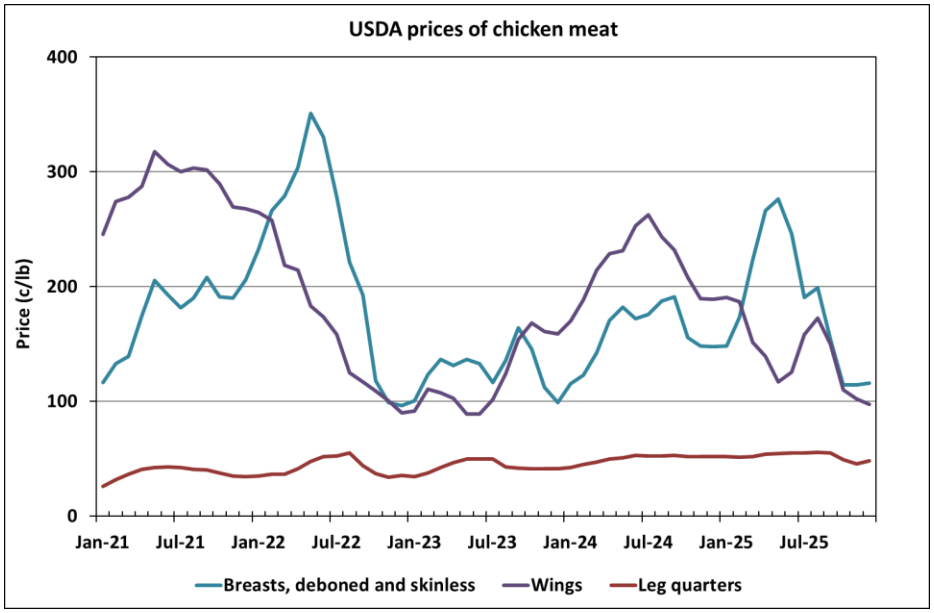


Figure 2: Chicken prices in the USA

Table 2: USDA portion prices (c/lb)

Portion	2024	2025	% change
Whole broiler	129.35	125.02	-3.4
Breasts, deboned and skinless	159.60	184.93	15.9
Tenderloins	203.04	198.07	-2.5
Breast with ribs	129.18	163.35	26.5
Breast (line run)	106.02	118.60	11.9
Legs	69.75	75.16	7.8
Leg quarters	49.99	52.13	4.3
Drumsticks	45.53	50.72	11.4
Thighs	91.11	81.53	-10.5
Thighs, deboned and skinless	161.91	175.84	8.6
Wings	217.52	142.17	-34.6

1.3. Broiler breeders

In total, 9.203 million female parent pullets were placed on farms in 2025; an annual increase of 0.7%. The average number of parent males and females in rearing during the year was 4.285 million per week; 36 400 birds (-0.8%) less than 2024. According to the avian influenza (AI) database, the number of great-grandparent and grandparent stock in rear and lay was 622 500.

An average broiler breeder laying flock of 6.433 million hens was estimated for the year 2025, 25 600 hens (+0.4%) more than the previous year. Figure 3 shows the five-year trends in the annual placements of day-old female parents and the average size of the national broiler breeder flock.

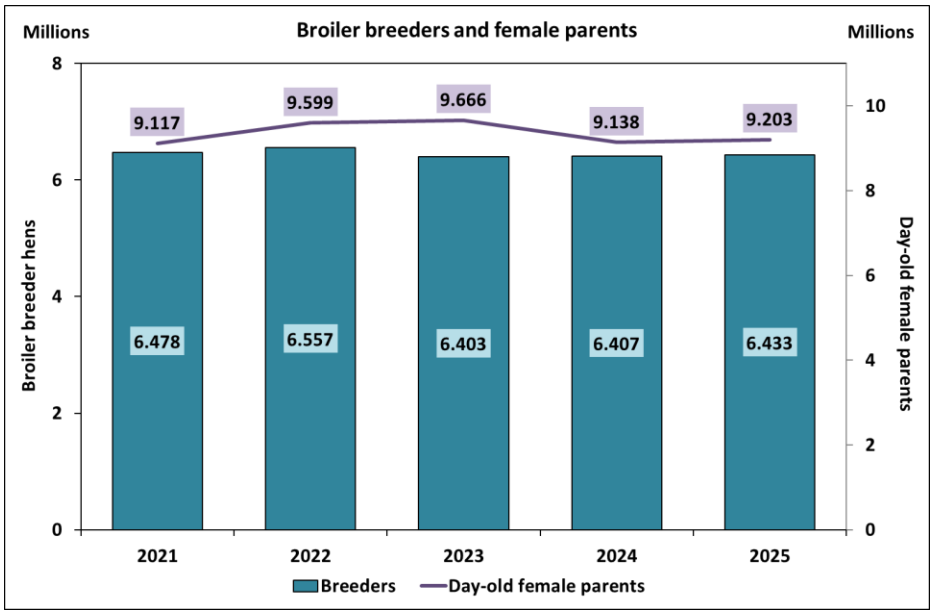


Figure 3: Trends in the breeder flock and female parents hatched

1.4. Day-old chicks and broiler production

Figure 4 shows the five-year trend in the actual number of chicks hatched and the estimated number of broilers slaughtered. In 2025 the total hatch increased by 2.5% to 1 203 million. A total of 1 135 million broilers were slaughtered; a growth of 22.0 million (+2.0%) birds compared to the previous year. Bird numbers are summarised in Table 3.

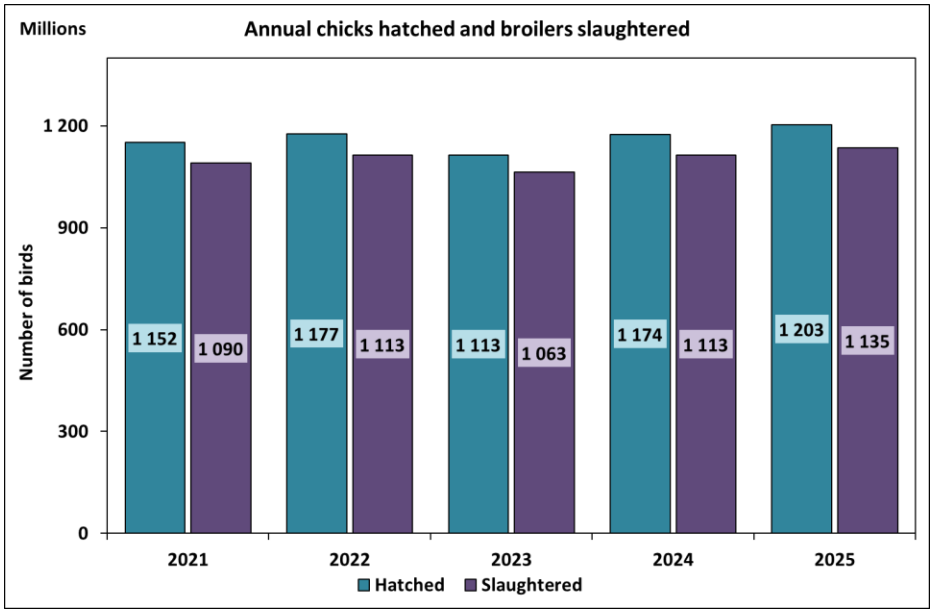


Figure 4: Trends in the broiler flock

Table 3: Bird numbers for the broiler industry (millions)

Year	Broiler breeders*		Breeders	Broiler chicks hatched		Broilers	Broilers slaughtered	
	Rearing	Laying	Per week	Per week	Per annum	Per week	Per week	Per annum
2024	4.322	7.054	11.376	22.452	1 173.98	99.960	21.293	1 113.28
2025	4.285	7.070	11.355	23.081	1 203.41	102.583	21.767	1 135.26
Change	-0.036	0.015	-0.021	0.629	29.42	2.623	0.475	21.98
% change	-0.8	0.2	-0.2	2.8	2.5	2.6	2.2	2.0

* includes males

Figure 5 shows the distribution of the broiler and breeder birds per local municipality (source: AI surveillance monitor: 4Q2025). The highest densities of birds belonging to the broiler industry were in Victor Khanye and Lekwa, both in Mpumalanga.

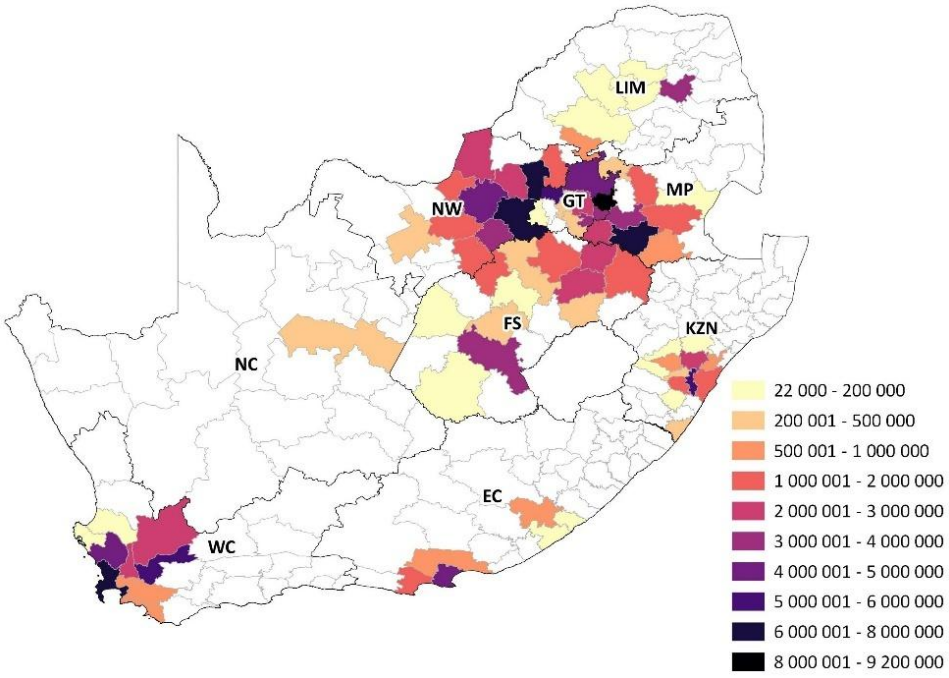


Figure 5: Distribution of birds per local municipality

1.5. Prospects for 2026

Based on the number of day-old parent pullets placed to December 2025, the size of the breeder laying flock is expected to expand from 6.39 million birds in December 2025 to 6.62 million birds (+3.6%) by May 2026.

1.6. Feed cost

The average broiler feed price for 2025 was R8 461 per tonne (+0.1%) and for broiler breeder feed R7 219 per tonne (-0.3%). The prices include distribution cost, but exclude medication, additives and VAT. The movement in the two feed prices over a five-year period is shown in Figure 6. Following the alarming increase in 2022, feed prices remained relatively high. The continued gradual decline in 2025 was welcomed by the industry.

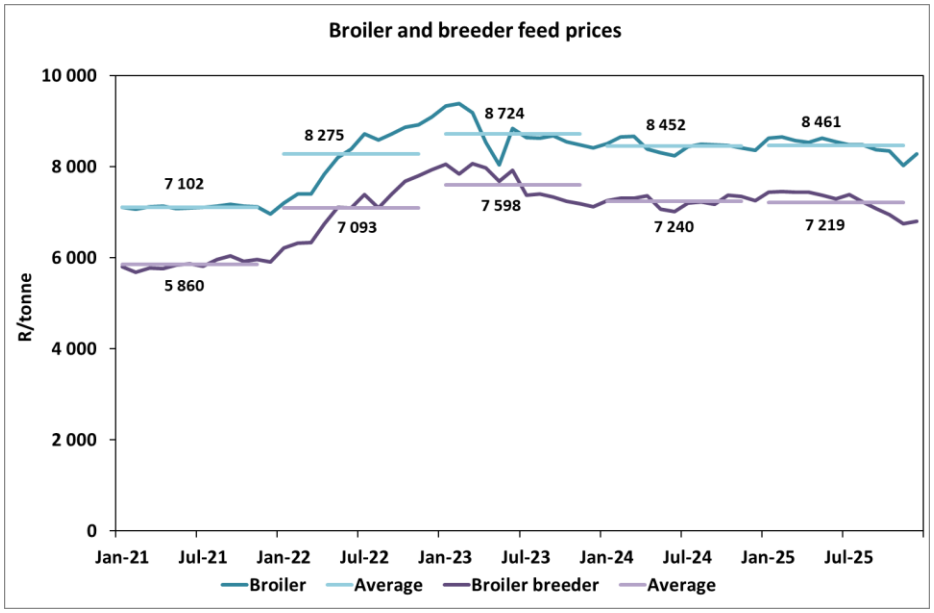


Figure 6: Movement in broiler and breeder feed prices

The year-on-year percentage changes in the broiler feed price and the producer price are shown in Figure 7. In 2022 producers were unable to recover the soaring feed cost in broiler price increases. In December of that year, broiler feed cost 30.6% more than in December 2021; a record high. The pressure on margins eased from May 2023, as broiler prices showed positive growth year-on-year, while feed prices declined.

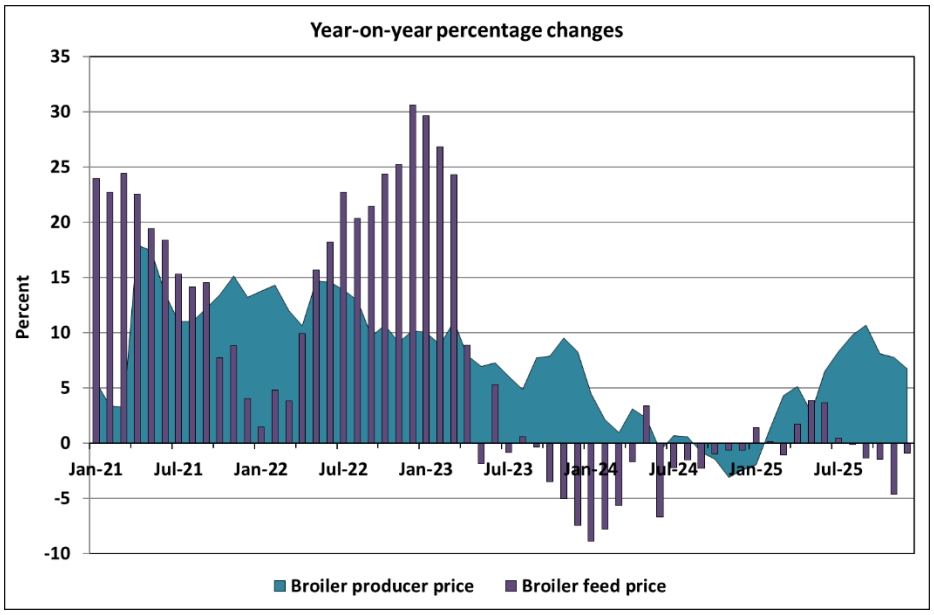


Figure 7: Yearly percentage changes in producer price and broiler feed price

Figure 8 illustrates the ratios between the chicken price and two feed ingredient prices, namely yellow maize and soya beans. Higher ratios are more favourable for poultry farmers.

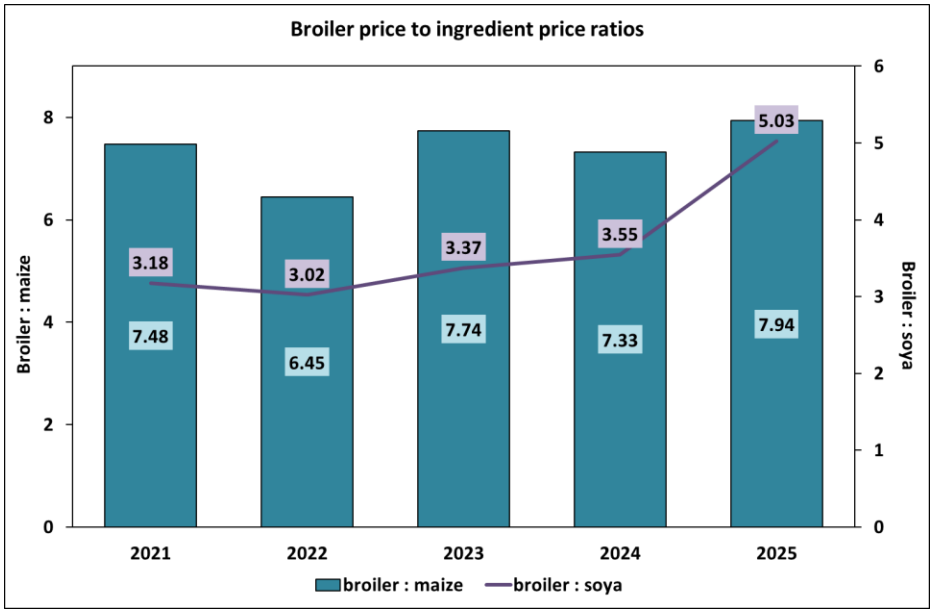


Figure 8: The trend in ratios between broiler and feed ingredient prices

1.7. Feed usage

The feed usage for broiler breeders and broilers is summarised in Table 4. Total feed consumption increased by 1.8% in 2025.

Table 4: Feed usage for the broiler industry (tonnes)

Year	Broiler breeders*		Total breeding stock		Broilers		Total broiler industry	
	Rearing	Laying	Per annum	Per week	Per annum	Per week	Per annum	Per week
2024	100 526	400 428	500 954	9 581	2 900 097	55 466	3 401 051	65 047
2025	99 167	401 073	500 240	9 594	2 961 839	56 802	3 462 079	66 396
Change	-1 358	645	-714	13	61 741	1 336	61 027	1 349
% change	-1.4	0.2	-0.1	0.1	2.1	2.4	1.8	2.1

*incudes males

According to AFMA, members' feed sales from 1 April 2024 to 31 March 2025 for breeders and broilers amounted to 3.670 million tonnes. This includes 206 423 tonnes manufactured in other SADC countries. The regional breakdown is given in Table 5; tonnages were calculated from the percentages given in the AFMA annual report.

Table 5: Feed sales per region				
Province/region	Broiler		Broiler breeder	
	Tonnes	%	Tonnes	%
Eastern Cape	173 890	5.6	27 059	4.6
Free State	477 890	15.5	35 687	6.1
Gauteng	580 868	18.8	145 332	24.8
KwaZulu-Natal	263 610	8.6	105 183	17.9
Limpopo	96 195	3.1	1 174	0.2
Mpumalanga	485 906	15.8	68 205	11.6
North West	429 484	13.9	40 442	6.9
Northern Cape	0	0.0	0	0.0
Other SADC countries	118 085	3.8	88 338	15.1
Western Cape	457 233	14.8	75 483	12.9
Total	**3 083 162**	**100.0**	**586 961**	**100.0**

If feeds derived from concentrates are included, the total becomes 3.673 million tonnes. The overall national feed production figure, estimated by modelling, is 3.680 million tonnes. This means that AFMA members have 99.8% of the market (source: AFMA).

For the same period, SAPA estimated feed consumption at 3.419 million tonnes; 261 000 tonnes less (-7.1%) than national feed sales. If the feed manufactured by other SADC countries is removed from the calculation, the difference drops to 54 600 tonnes (-1.6%). SAPA's estimate does not include feed for grandparent and great-grandparent flocks.

1.8. Meat production

Total production of poultry meat (all saleable products) for 2025 was 1.937 million tonnes; an annual increase of 2.3% (Table 6) (source: SAPA).

Table 6: Annual meat production (thousand tonnes)				
	2024	2025	% of total	% change
Broilers	1 799.07	1 834.60	94.7	2.0
Cull breeders	31.09	34.39	1.8	10.6
Cull laying hens	26.47	30.66	1.6	15.8
Commercial production	1 856.63	1 899.65	98.1	2.3
Subsistence farming	35.98	36.69	1.9	2.0
Ducks	0.77	0.77	0.0	-0.7
Total	**1 893.39**	**1 937.11**	**100.0**	**2.3**

The DoA estimated the total production of poultry meat at 1.941 million tonnes, up 1.4% from 2024. The department's estimate is 0.2% more than SAPA's production estimate.

1.9. Consumption

According to SAPA's calculations, chicken meat consumption amounted to 2.266 million tonnes in 2025, equating to a per capita consumption of 35.9 kg (Table 7). This includes the sale of spent hens from the broiler breeder and commercial layer industries and all edible offal. If brine is included in the calculations, the per capita consumption increases to 38.0 kg.

Table 7: Consumption of poultry meat

	DALRRD/DoA			SAPA		
	2024	**2025**	**% change**	**2024**	**2025**	**% change**
Poultry meat						
Tonnes (thousand)	2 287	2 287	0.0	2 250	2 273	1.0
Per capita (kg)	35.99	35.94	-0.1	35.71	36.02	0.9
Chicken meat						
Tonnes (thousand)				2 236	2 266	1.3
Per capita (kg)				35.49	35.92	1.2

1.10. Gross value

The gross value of primary agricultural production from poultry meat (inclusive of all types of poultry) for the year 2025 was R74.41 billion, reflecting an annual increase of 3.2% (source: DoA). Poultry meat contributed 36.0% to the gross value of animal products (down from 36.4% in 2024) and 14.8% to all agricultural production (down from 15.7% in 2024). Ostrich meat is not included in this figure.

1.11. Industry turnover

The estimated turnover from the broiler industry is shown in Table 8. Average day-old chick prices were calculated from a relatively small sample size, representing 16.8% of chicks hatched in 2025. The cull bird price for 2025 represents 41.1% of total breeder culls.

Table 8: Turnover of the broiler industry

Year	**DOC industry**		**Broiler industry**					**Total**
	Price (R/doc)	Turnover (R million)	Producer price (R/kg)	Turnover (R million)	Cull birds (million)	Cull price (R/bird)	Turnover (R million)	Turnover (R million)
2024	8.00	9 387.7	31.83	57 264.5	7.741	58.00	449.0	67 101.3
2025	8.06	9 699.5	33.66	61 752.6	8.635	55.17	476.4	71 928.5
Change	0.06	311.7	1.83	4 488.1	0.894	-2.8	27.4	4 827.2
% change	0.8	3.3	5.7	7.8	11.5	-4.9	6.1	7.2

DOC = day-old chick

2. SUBSISTENCE AND SMALL COMMERCIAL FARMERS

These statistics summarise detailed telephonic surveys covering the warmer months (October 2024 to March 2025) and cooler months (April to September 2025). All prices exclude transport and VAT. Weighted averages were calculated throughout.

The survey indicated that 73 broiler producers stopped farming during the year due to various difficulties that were encountered. The majority of these respondents planned to resume farming at some stage.

2.1. Hatcheries

Sixteen hatcheries (compared to eight in 2024), located in all provinces except Northern Cape and Western Cape, responded to the survey.

A total of 599 400 hatching eggs were purchased during the year at an average cost of R3.34 per egg; a 31.2% annual price decrease. Of the chicks hatched, 147 100 were kept by the respondents for their own broiler farms and 433 700 were sold at an average price of R13.61 each (+8.8%). The total value of the day-old chick sales was R5.90 million.

2.2. Broiler producers

A total of 268 broiler farmers (down from 286 in 2024), from all 9 provinces, took part in the survey. The provincial representation of broiler farms was Eastern Cape (12), Free State (15), Gauteng (46), KwaZulu-Natal (26), Limpopo (133), Mpumalanga (18), North West (13), Northern Cape (4), and Western Cape (3). The farms had 50% female ownership.

The average purchase price of a day-old chick in 2025 was R12.28; a 2.1% annual decrease. The sum of chicks placed per cycle was 300 200 (+41.3%) and the average number of chicks placed per cycle per farm was 1 127. The average utilisation of the broiler farms was 35.7% of capacity; up from 20.4% the previous year. The reported average mortality rate per cycle was 5.6%.

2.3. Broiler feed

Bagged feed was purchased by 97% of the respondents in 2025. The prices are summarised in Table 9 and exclude VAT and transport. The majority of the farmers had to travel between 10 and 50 kilometres to reach a feed supplier.

Table 9: Feed prices (SSCF)		
Feed	**Bags (R/50 kg)**	**% change**
Broiler starter	452.40	0.1
Broiler grower	433.21	1.3
Broiler finisher	416.25	1.5

Total bagged feed purchased by small broiler farmers for the year amounted to 5 494 tonnes, which equates to approximately 423 bags per farmer. The value of bagged feed purchases for 2025 was R43.41 million; a 4.6% year-on-year increase. Figure 9 illustrates the five-year trend in the bagged feed cost and price of day-old chicks for the producers.

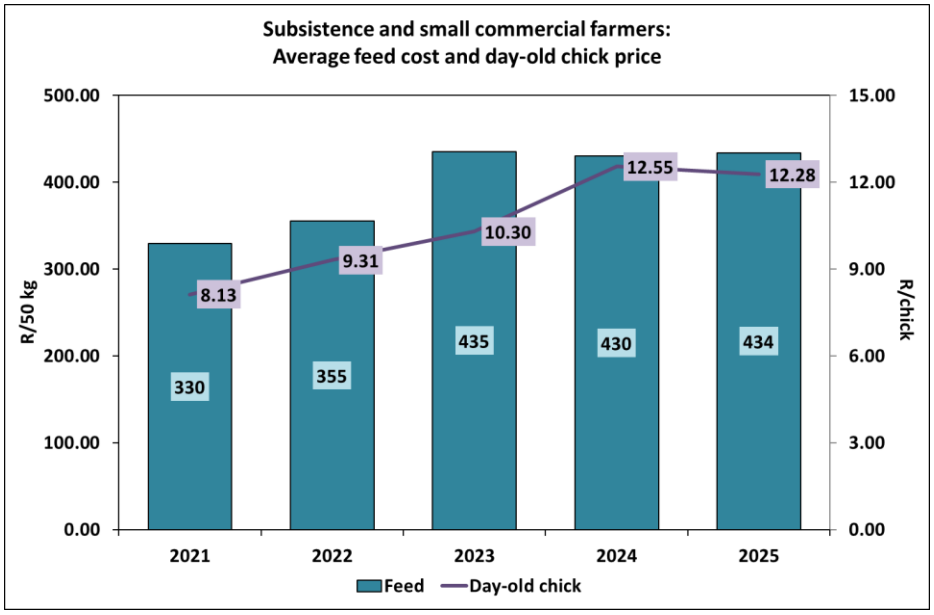


Figure 9: The trend in feed and day-old chick prices

2.4. Broiler sales

The average cycle length (from placement to placement) was 7.8 weeks, and the average age at which broilers were sold live was 6 weeks (42 days). The sales figures for the year 2025 are summarised in Table 10. The total value of these broiler sales was R149.07 million. The average slaughter fee charged by abattoirs was R8.30 per bird (+6%). Figure 10 shows the five-year trend in the prices of live and slaughtered broilers.

Table 10: Broiler sales figures (SSCF)					
Marketing channel	**% of birds**	**Quantity**	**Price (R/bird)**	**Price (R/kg)**	**Total value (R million)**
Live sales	84.1	1 534 334	83.57		128.13
Abattoir	15.9	290 658	98.64	40.29	20.94
Total	100.0	1 824 992	85.97		149.07

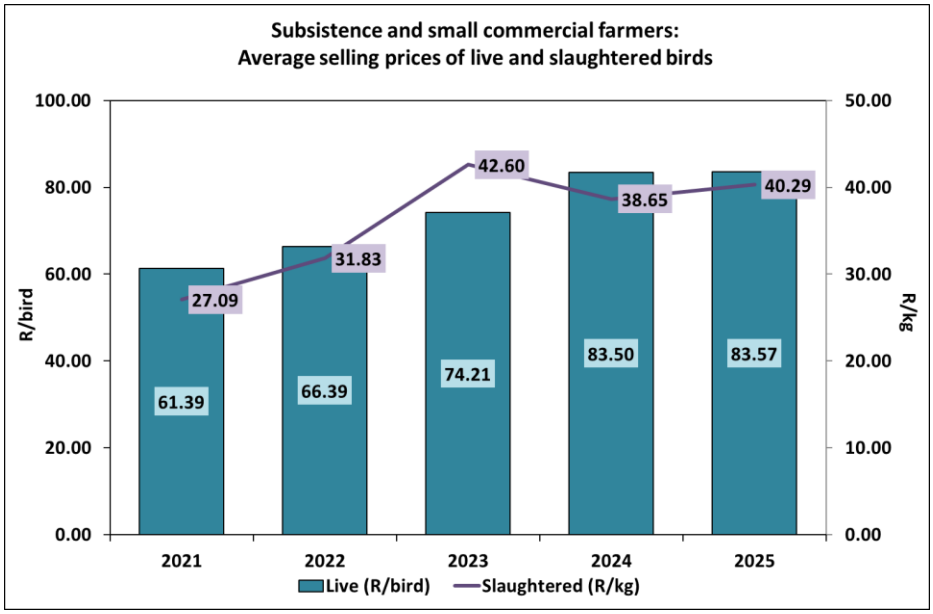


Figure 10: The trend in the selling prices of live and processed broilers

2.5. Contract growers

The larger contract growers rearing more than 40 000 birds per cycle are included in the subsistence and small commercial farmer surveys as a means of collecting their data. An additional 5 contract growers took part in the 2025 surveys, bringing the total to 28. The 28 were located in all provinces apart from Eastern Cape and Northern Cape. The highest density of birds was in Mpumalanga (24.8%), Gauteng (24.2%) and North West (22.1%). Farm ownership remained skewed in favour of men (77%).

A total of 5.80 million chicks (+32.1%) were placed on contract farms per cycle, with a farm average of 207 000 chicks placed per cycle. The average mortality rate on the contract growers' farms was 4.4% and the average age at slaughter was 4.7 weeks (32.6 days).

2.6. Abattoirs

Fifteen abattoir owners responded to the survey in 2025, compared to twelve the previous year. These businesses were located in all provinces except Northern Cape. The abattoirs in Mpumalanga and

Gauteng had the highest throughput. Ownership of the businesses was equally divided between men and women.

The average number of birds slaughtered per day was 437, down from 486 in 2024. The abattoirs operated on average four days per week. An estimated 1.213 million birds were slaughtered during the year; a 10.1% annual increase. Their average slaughter fee was R8.12 (-9.3%) per bird and the average selling price for dressed birds was R43.99/kg (+2.0%) or R80.51 per bird (+4.0%).

3. TRADE

3.1. Poultry imports

Annual poultry imports totalled 378 901 tonnes (source: SARS); this was a decrease of 36 189 tonnes (-8.7%) compared to 2024. The bulk of this was chicken, but 7 146 tonnes of turkey meat at a value of R233.2 million and 164 tonnes of other poultry meat valued at R12.1 million were also imported during the year. The FOB value of poultry imports amounted to R4.95 billion; a decrease of R0.455 billion (-8.4%) from the 2024 value.

Poultry imports made up 16.7% of poultry meat consumption, compared to 18.4% in 2024.

Brazil was the main country of origin of poultry imports, accounting for 84.9% (up from 81.3% in 2024) or 321 537 tonnes. Argentina was the second largest country of origin, with 5.6% or 21 120 tonnes; followed by the USA (2.7% or 10 242 tonnes); and Ireland (2.0% or 7 402 tonnes). As a whole, the EU contributed 4.2% (16 020 tonnes) to total poultry imports, compared to 7.7% in 2024.

3.2. Chicken imports

Chicken imports amounted to 371 592 tonnes; 28 803 tonnes less (-7.2%) than in 2024 (Figure 11; source: SARS). Chicken imports represented 98.1% of total poultry imports. Of the total chicken meat imported, 370 330 tonnes was frozen (99.7%), 0.7 tonnes was fresh and 1 261 tonnes was processed.

Chicken meat imports were equivalent to 19.2% of domestic chicken meat production and 16.4% of consumption in 2025.

The FOB value of chicken imports amounted to R4.700 billion; an annual decrease of R0.228 billion (-4.6%). The main contributors were frozen MDM at R2.243 billion, frozen chicken feet (R0.828 billion) and frozen leg quarters (R0.749 billion).

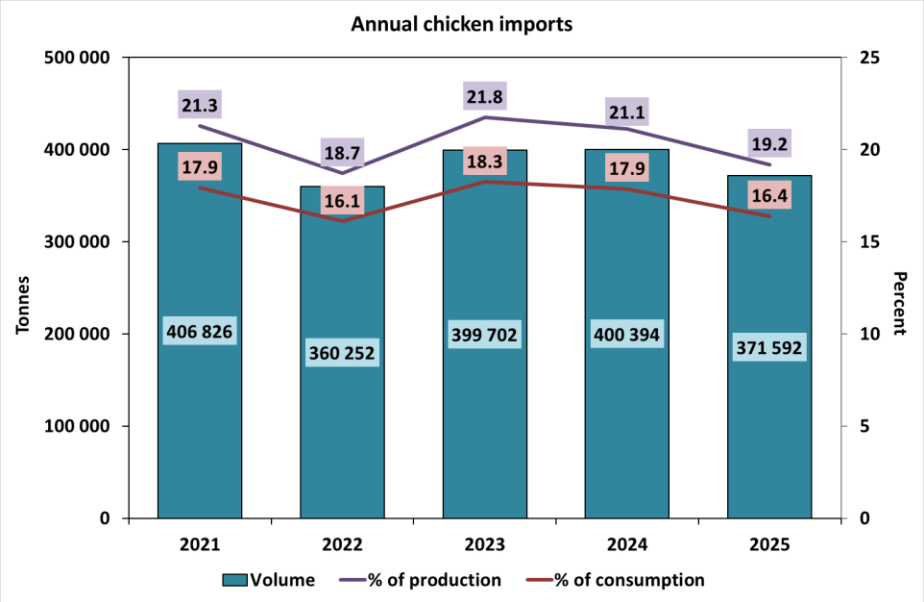


Figure 11: Annual chicken meat imports from all countries

Table 11 reflects the different frozen products in terms of volume and value, and their percentage changes, compared to the previous year (source: SARS). Of the 50 077 tonnes of bone-in portions, 67.9% were leg quarters, 17.5% wings, 9.1% drumsticks, 0.7% thighs, 0.2% bone-in breast portions, and 4.6% other bone-in cuts.

Table 11: Frozen chicken imports

Product	Volume (tonnes)	% change	Value (R million)	% change
MDM	205 295	-14.1	2 243.0	-12.7
Bone-in portions	50 077	25.9	1 171.4	34.6
Whole frozen birds	2 573	-71.6	66.8	-71.2
Carcasses	8 065	-43.8	63.5	-47.2
Boneless portions	1 214	-54.4	38.6	-46.5
Offal	103 106	9.0	1 062.7	3.0
Total	**370 330**	**-7.3**	**4 646.0**	**-5.1**

Chicken imports from Brazil decreased by 3.8% in 2025 to 315 560 tonnes (Figure 12). Brazil's contribution to total chicken imports was 84.9%. These imports were mostly MDM (188 553 tonnes; 59.8% of total) and frozen chicken feet (66 931 tonnes; 21.2% of total). The average price was R11.56/kg; MDM and chicken feet landed at R10.81/kg and R11.15/kg respectively.

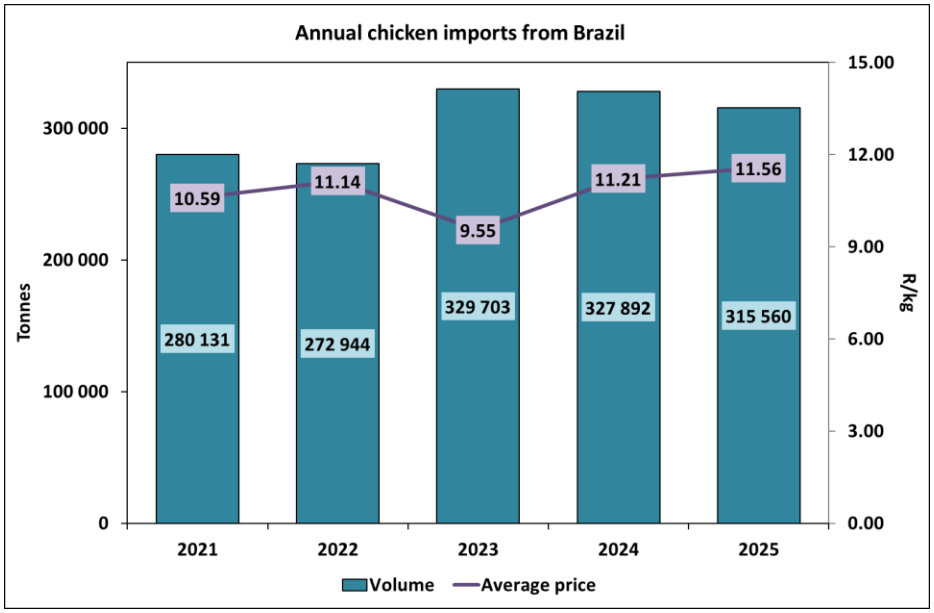


Figure 12: Chicken imports from Brazil

Imports of chicken from the EU amounted to 15 086 tonnes in 2025, compared to 29 195 tonnes the previous year; a 48.3% decrease (Figure 13). These imports landed in South Africa at R24.80/kg and accounted for 4.1% of total chicken imports. Frozen chicken feet (2 919 tonnes; 19.4% of total) and leg quarters (2 909 tonnes; 19.3% of total) landed at R18.93/kg and R33.08/kg respectively. Imports remained constrained owing to ongoing HPAI outbreaks in Europe.

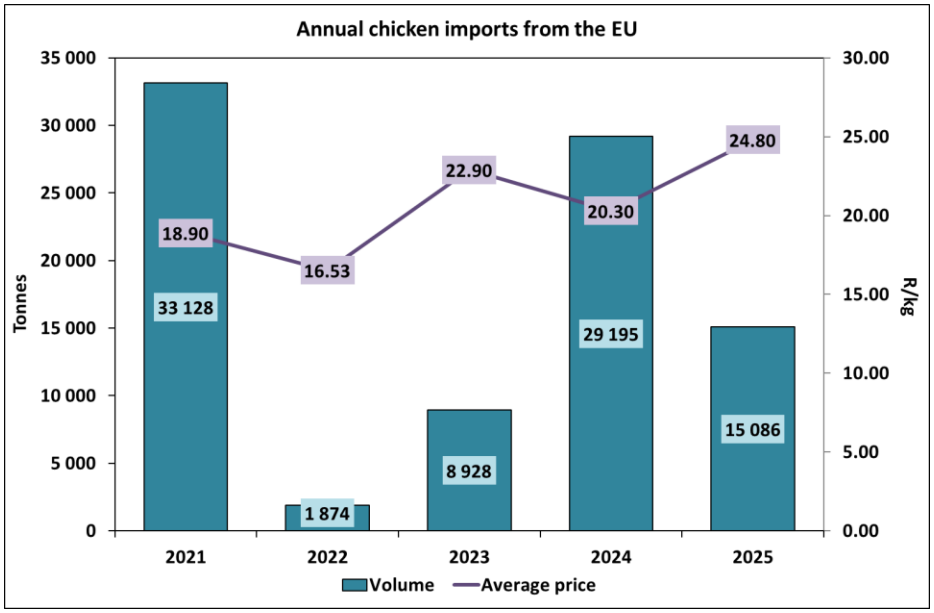


Figure 13: Chicken imports from the EU

Imports of chicken from the USA totalled 10 110 tonnes in 2025, a 16.8% annual decrease (Figure 14). These imports accounted for 2.7% of total chicken imports. Imports of frozen bone-in portions were

9 821 tonnes at an average price of R21.84/kg. Frozen leg quarters (8 607 tonnes) and frozen drumsticks (1 160 tonnes) made up the bulk of these bone-in portion imports (87.6% and 11.8% respectively). Imports from the USA were restricted owing to widespread outbreaks of HPAI H5N1.

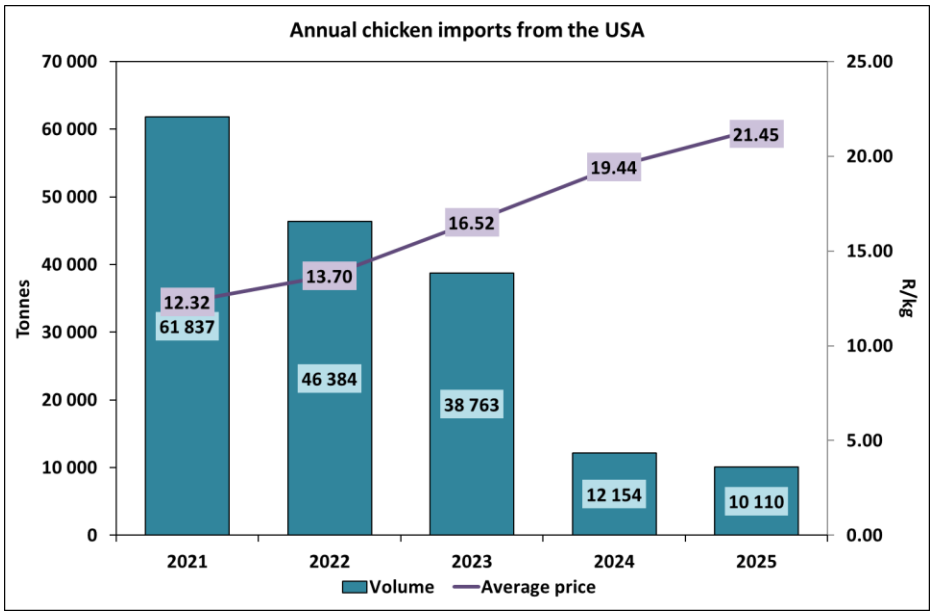


Figure 14: Chicken imports from the USA

The five-year trend in imports of frozen bone-in portions is shown in Figure 15.

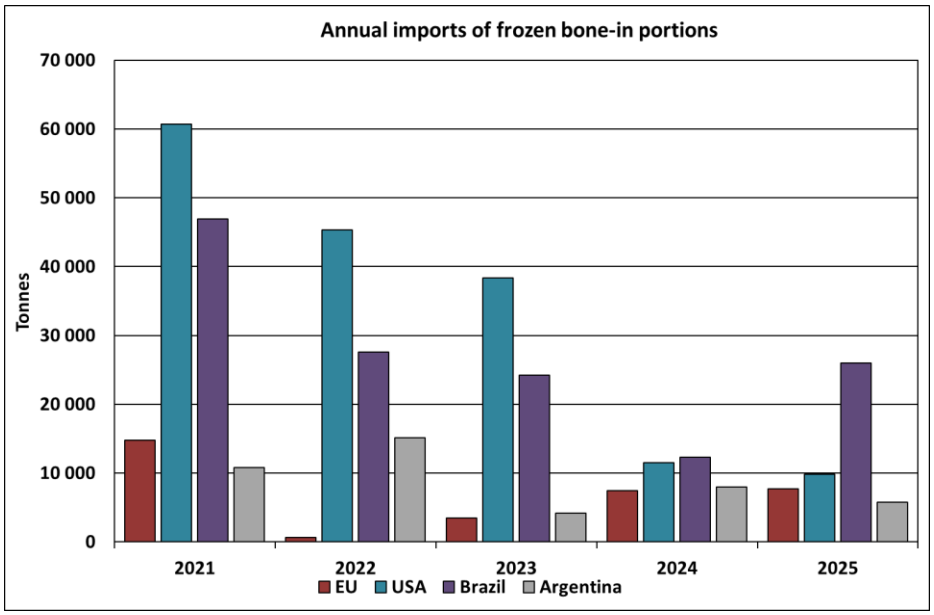


Figure 15: Frozen bone-in portion imports

3.3. Poultry exports

Exports of poultry meat and chicken meat are summarised in Table 12 (source: SARS). The volume of chicken meat exports dropped to a five-year low in 2025 (Figure 16). Exports were hampered by the country's HPAI positive status. Farms affected by H7N6 in 2023 were still officially under quarantine, and new outbreaks of H5N1 occurred in the second half of 2025.

Table 12: Annual exports

Year	Poultry		Chicken	
	Volume (tonnes)	Value (R million)	Volume (tonnes)	Value (R million)
2024	58 471	1 799.3	56 535	1 711.2
2025	42 991	1 510.2	41 607	1 443.2
Difference	-15 480	-289.0	-14 928	-268.0
% change	-26.5	-16.1	-26.4	-15.7

According to SARS, chicken meat exports were 96.8% of total poultry exports, with turkey contributing 0.6% (245 tonnes), and duck, geese and guinea fowl making up the remaining 2.6% (1 139 tonnes).

Chicken meat exports made up only 2.1% of domestic chicken meat production in 2025, compared to 3.0% the previous year.

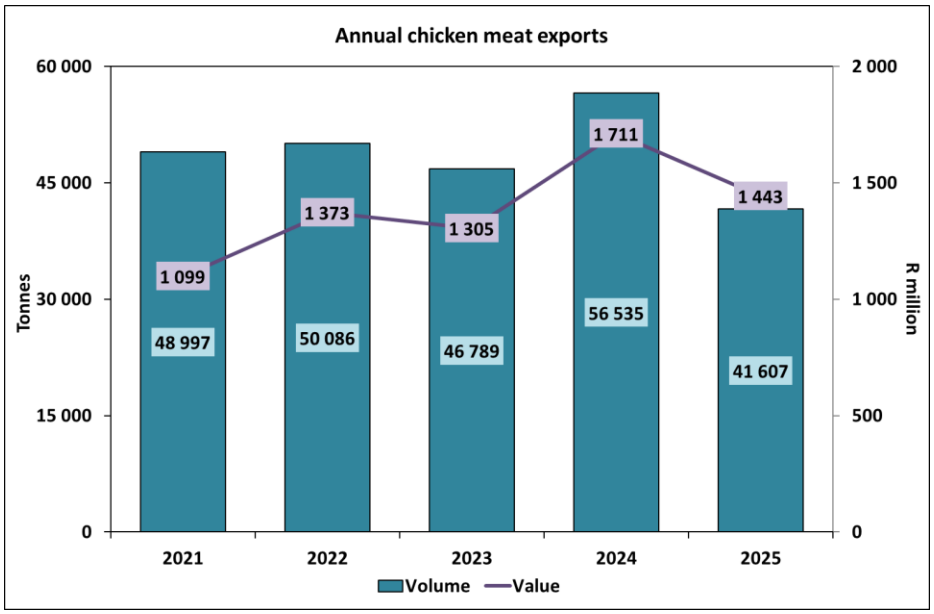


Figure 16: Annual exports of chicken meat

The main destination countries for chicken exports were Eswatini (47.2%), Namibia (24.7%), Mozambique (6.9%), Lesotho (5.8%), Botswana (5.6%), Zambia (3.5%), and Mauritius (3.1%). The remaining 16 destination countries collectively received 3.2% of the exports.

4. THE GLOBAL BROILER INDUSTRY

Global production of poultry meat is expected to increase by 2.9% in 2025, from 150.0 to 154.4 million tonnes (source: Food and Agriculture Organization (FAO), 2025. *Food outlook: biannual report on global food markets: November 2025*.). Lower feed prices and strong demand for poultry meat will drive this growth. Total meat production is forecast to increase by 1.4% to reach 383.5 million tonnes.

Global trade in poultry meat is forecast to increase by 1.1%, from 16.5 to 16.7 million tonnes, while trade in all meat will expand by 1.7% to 43.0 million tonnes. Trade patterns are being reshaped by tariffs, disease-related trade bans, strong demand, and tight supplies of beef (source: FAO, 2025. *Food outlook: biannual report on global food markets: November 2025*.).

The poultry meat statistics for 2025 are summarised in Table 13. The continent of Asia continued to be the world's largest producer, importer and consumer of poultry meat. The biggest exporter was South America (source: FAO, 2025. *Food outlook: biannual report on global food markets: November 2025*.).

Table 13: Poultry meat statistics for 2025 (thousand tonnes)

Region	Production	%	Imports	%	Exports	%	Utilisation	%
Africa	8 341	5.4	2 555	16.2	76	0.5	10 820	7.0
Asia	63 058	40.8	7 663	48.5	4 080	24.5	66 642	43.4
Central America	6 324	4.1	2 164	13.7	46	0.3	8 442	5.5
Europe	24 483	15.9	2 427	15.4	3 322	19.9	23 589	15.4
North America	25 952	16.8	438	2.8	3 597	21.6	22 792	14.8
South America	24 447	15.8	421	2.7	5 495	32.9	19 373	12.6
Oceania	1 808	1.2	129	0.8	70	0.4	1 868	1.2
World	**154 413**	**100.0**	**15 797**	**100.0**	**16 686**	**100.0**	**153 526**	**100.0**

The USDA predicts global chicken meat production of 109.6 million tonnes in 2026; a 2% annual increase. Most of the expansion in production is expected in Brazil, China, the EU and the USA. Global exports for the year are forecast to reach 14.7 million tonnes (+3%), with Brazil and China capturing the largest share of the growth (source: USDA, 9 December 2025. *Livestock and poultry: world markets and trade*.). Figure 17 shows a comparison of the USDA statistics, expressed as percentages of the global total, for four major players: the USA, Brazil, the EU and China.

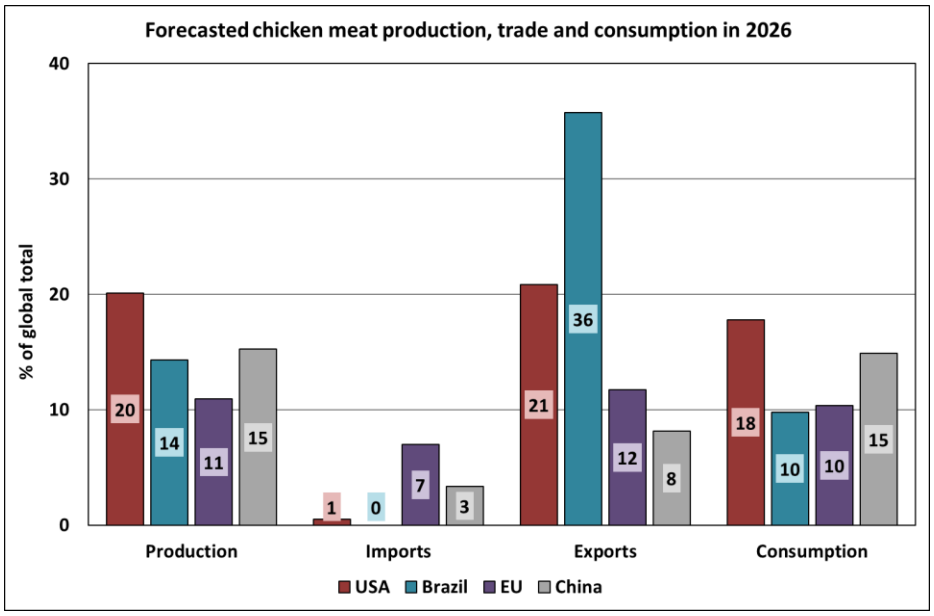


Figure 17: USDA forecasts expressed as a percentage of the global total

Figure 18 shows the annual trend in global meat prices for the past five years (source: FAO, 2025. *Food outlook: biannual report on global food markets: November 2025*.).

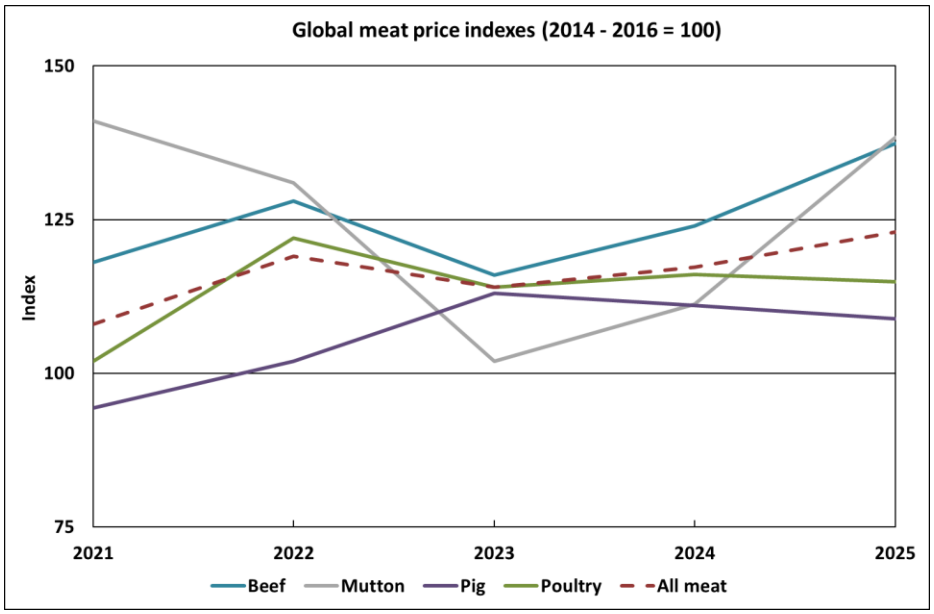


Figure 18: Annual global meat price indexes