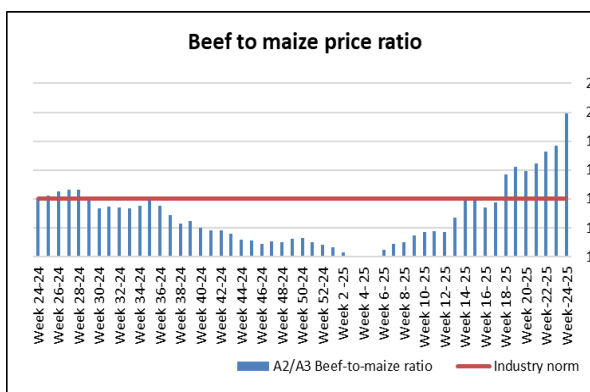
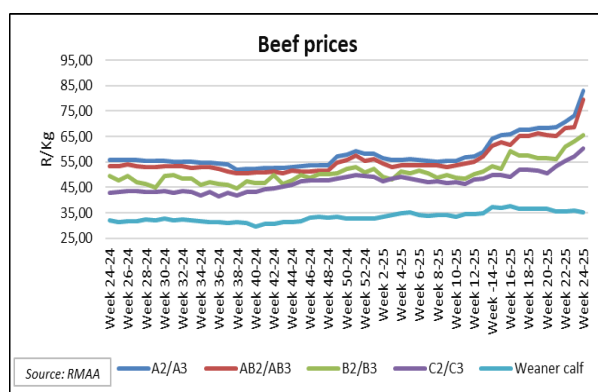




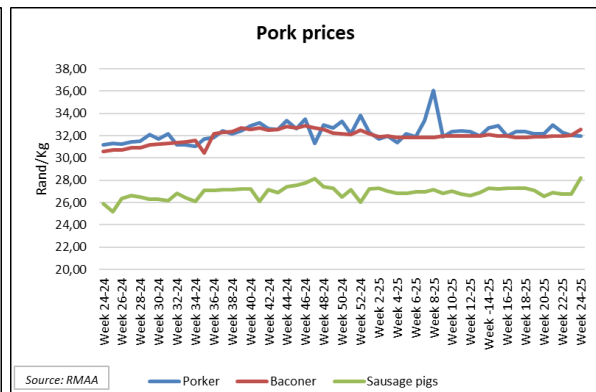
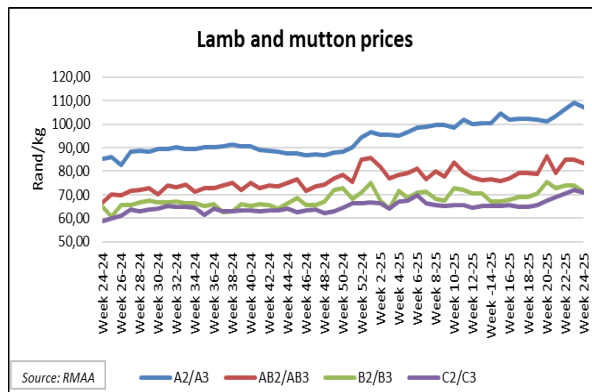
South Africa has lifted its ban on chicken imports from Brazil. This ban had been in response to the confirmation of a bird flu (avian influenza) outbreak in Brazil on 15 May 2025. The South African Department of Agriculture has verified that chicken products from outside the 10-kilometer containment zone are safe to import. This follows Brazil's confirmation that the outbreak had been contained to a single state. Brazil is the biggest exporter of chicken products to South Africa and it accounted for 81% of chicken imports in 2024. However, South Africa mainly imports mechanically deboned meat (MDM) from Brazil which accounts for more than 50% of total chicken imports. South Africa also recently secured a year-long arrangement for chicken imports from the United States (US), even though there have been cases of bird flu in the US. South Africa has rolled out its first mass poultry vaccination programme to curb bird flu. The government has appointed a Vaccination Team which has received a list of farms to be vaccinated. The Vaccination Team is prioritising high risk areas and commercial flocks to contain the virus and prevent culling. Currently, there are no reported outbreaks of bird flu in South Africa, but the disease is spreading in other countries.

The beef industry



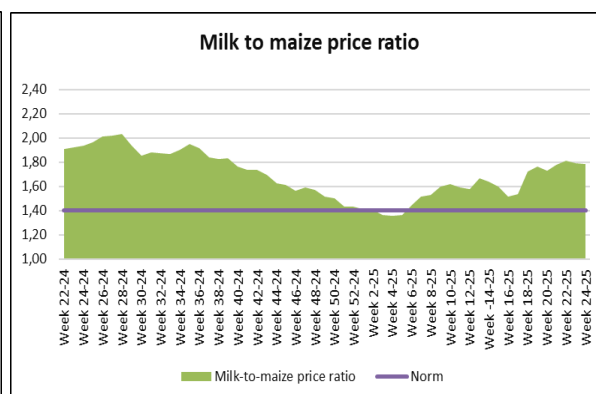
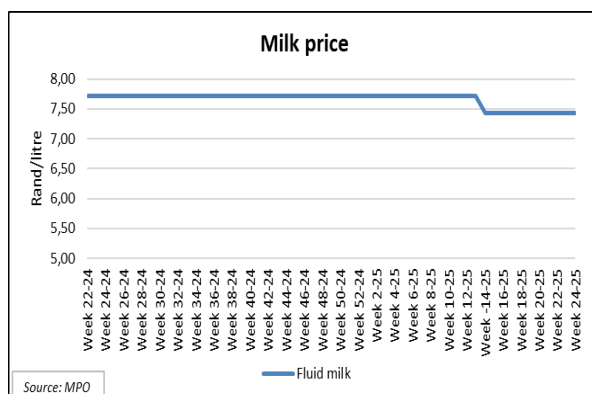
- **Beef prices** were bullish week-on-week (w/w).
- The average prices of class A2/A3 and AB2/AB3 increased by 13.5% and 15.6% w/w to R83.05/kg and R79.36/kg, respectively.
- The average prices of class B2/B3 and C2/C3 increased by 4.2% and 5.4% w/w to R65.69/kg and R60.43/kg, respectively.
- Average beef prices were 43% higher y/y from improved consumer demand and an expected shortage of beef following an FMD outbreak on the biggest feedlot in the country.
- The average **weaner price** decreased by 2.5% w/w to R35.02/kg due to inactive demand for weaners on the market.
- In the past week, the average **beef-to-maize price ratio** increased by 12.8% w/w to 19.9 due to an increase in beef price.

The mutton and pork industries



- **Mutton and lamb prices** were bearish w/w.
- The average prices of class A2/A3 and AB2/AB3 decreased by 1.6% and 1.8% w/w to R107.23/kg and R83.46/kg, respectively.
- The average prices of class B2/B3 and C2/C3 also decreased by 3.7% and 1.3% w/w to R71.28/kg and R70.99kg, respectively.
- The average mutton and lamb prices were 20.2% higher y/y due to improved demand.
- **Pork prices** traded mixed w/w.
- The average price of porkers decreased by 0.1% w/w to R31.98/kg.
- The average prices of baconers and sausage increased by 1.8% and 9% to R32.58/kg and R28.22/kg, respectively.
- On average, pork prices were 6% higher y/y.

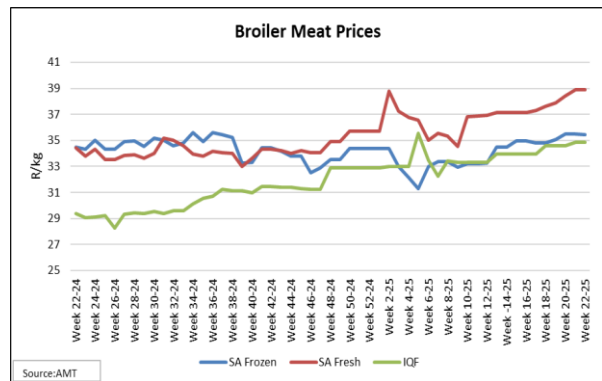
The dairy industry



- The latest average **milk producer price** set by dairy processors in April 2025 is estimated at R7.43/l.
- In the past week, the average **milk-to-maize price ratio** decreased by 0.6% w/w to 1.89.
- The decrease in the milk-to-maize price ratio was due to a 6% w/w increase in the average yellow maize price.
- The average milk-to-maize price ratio is still above its long-term average of 1.4.

The broiler industry

- **Broiler prices** traded mixed w/w.
- The average price of **South African frozen chicken** increased by 0.7% w/w to R35.83/kg, while **fresh chicken** decreased by 0.4% w/w to R39.30/kg.
- The average price of **IQF chicken** increased w/w by 0.5% to R34.87/kg.
- Average chicken prices were up by 12.2% on an annual basis.



The wool industry

Indicator	SA prices (R/kg)		Change
	Previous	Current	
Clean non-RWS certified wool	173,80	173,80	0,0%
Clean RWS certified wool	177,32	177,77	0,3%

- The final **wool auction** of the 2024/2025 season took place on 11 June 2025, with 11 618 bales of wool on offer.
- Sustainable certified merino wools accounted for 60.3% of the total wool on offer.
- Approximately 97.3% of the wool that was on offer was sold during the auction.
- Compared to the previous auction, the **non-RWS** (Responsible Wool Standard) remained flat at R173.80/kg, while the **RWS** increased by 0.3% to R177.77/kg.
- The next wool auction is expected to take place on 20 August 2025.

Mohair industry

Commodity	Rand/kg			Change from previous	Change (y/y)
	Last year	Previous	Current		
Mohair					
Kids	665,97	711,06	718,17	↑ 1,0%	↑ 7,8%
Young Goats	363,92	333,69	327,44	↓ -1,9%	↓ -10,0%
Adults:					
- Fine	341,88	299,36	293,59	↓ -1,9%	↓ -12,4%
- Strong	307,56	286,88	281,14	↓ -2,0%	↓ -6,7%

- The final **mohair sale** of the 2025 summer season took place on 10 June 2025, with 147 436 kg of mohair on offer.
- Approximately 91% of mohair that was offered was sold during the sale.
- About 78% of the mohair that was offered during the sale was **RMS** (Responsible Mohair Standard) certified.
- The rand traded stronger against the dollar, however, not all mohair buyers participated, resulting in a 2% decrease in the average market indicator compared to the previous sale.
- The average prices of **kid mohair** increased by 1%, while **young goat mohair** decreased by 1.9% compared to the previous sale.
- Average prices of **adult fine mohair** and **adult strong mohair** decreased by 1.9% and 2% compared to the previous sale.
- The first mohair sale of the 2025 winter season is expected to take place on 19 August 2025.

Sources

Agri-Market Trends.

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Milk Producers Organisation.

Mohair South Africa.

Red Meat Abattoir Association.

Trade map.

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