A PROFILE OF THE SOUTH AFRICAN BROILER MARKET VALUE CHAIN

2019

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# TABLE OF CONTENTS

1. **DESCRIPTION OF THE INDUSTRY** .................................................................................................................. 3  
   1.1. **PRODUCTION AREAS** ................................................................................................................................. 4  
   1.2. **PRODUCTION TRENDS** ................................................................................................................................. 4  
   1.3. **LOCAL CONSUMPTION** .................................................................................................................................. 5  
   1.4. **EMPLOYMENT** ............................................................................................................................................... 6  
2. **MARKET STRUCTURE** .......................................................................................................................................... 6  
   2.2. **IMPORT – EXPORT ANALYSIS** ....................................................................................................................... 7  
      2.2.1. **Exports** .................................................................................................................................................... 7  
      2.2.2. **Imports** .................................................................................................................................................. 16  
3. **BROILER MEAT MARKET VALUE CHAIN** ............................................................................................................. 20  
4. **MARKETING CHANNELS FOR BROILER MEAT** .................................................................................................. 22  
5. **EMPOWERMENT STRATEGIES BY THE INDUSTRY AND GOVERNMENT** ......................................................... 23  
6. **BARRIERS TO PARTICIPATION BY THE EMERGING SECTOR** ........................................................................... 23  
7. **OPPORTUNITIES AND WEAKNESSES** ............................................................................................................. 25  
8. **MARKET INTELLIGENCE** ................................................................................................................................. 26  
   8.1. **EXPORT TARIFFS FOR BROILER MEAT** ......................................................................................................... 26  
   8.2. **IMPORT TARIFFS FOR BROILER MEAT** ......................................................................................................... 27  
9. **PERFORMANCE ANALYSIS OF SOUTH AFRICAN POULTRY INDUSTRY IN 2018** ............................................. 29  
10. **ACKNOWLEDGEMENTS** ...................................................................................................................................... 41
1. DESCRIPTION OF THE INDUSTRY

Broiler is the biggest sector within agricultural sector of South Africa in terms of production value. In 2017/18, the sector generated R46.5 billion of gross value which was about 16.5% of total gross value of agricultural products. In comparison to other livestock products, broiler accounts for 33% of all animal products in South Africa in Rand terms. South Africa remains the major broiler producer in Southern Africa accounting for 80% of total broiler production in the region. Broiler production dominates the agricultural sector and it remains cheapest supplier in protein than all other animal proteins followed by beef. The growth had spillover effects in the grain and chick industries. Broiler meat accounts for about 93.6% to the total poultry-meat production, with the rest made up of mature chicken slaughter (culls), small-scale and backyard broiler meat production and other specialized broiler meat products (geese, turkey, ducks and guinea fowl).

The gross value of broiler meat is depended on the quantity produced and prices received by producers. Figure 1 below, shows the gross value of broiler meat production from 2008/09 to 2017/18. The trend shows that gross value has been increasing during the period under review. Only in 2009/10 were there was a decrease of value from the previous year. The average gross value of production amounted to R32 billion per annum over ten years. The gross value continued increasing due to increasing production and price of broiler meat.

![Figure 1: Gross value of broiler slaughtered](image-url)

Source: Statistics and Economic Analysis, DAFF
1.1. Production areas.

Broiler meat is produced throughout South Africa with North West, Western & Northern Cape, Mpumalanga and Free State Provinces being the largest producers accounting for approximately 74% of total production.

Figure 2 below shows the distribution of birds during 2018.

![Figure 2: Distribution of broilers in South Africa during 2018](image)

During 2018, North West Province produced 22% of the entire broiler meat in South Africa followed by Mpumalanga Province by 21%, Western & Northern Cape Province 19% and Free State Province 12%. Limpopo Province was the least producer, producing 3% of South African broiler meat.

1.2. Production trends.

Over the past decade there has been a growth of chicken production and a change in how chicken products are produced, processed, marketed and consumed. Figure 3 below shows the broiler production and slaughtering trends from 2009 to 2018. The broiler meat production has been increasing for the previous decade, however from 2015 to 2017, there was a decrease. This might be due to the increasing inputs prices which puts the profits under pressure coupled with the 2015/16 drought. In 2018, the production slightly increased by 2%. The broiler slaughtering has been fluctuating over the past decade, despite the fluctuation the number of birds slaughtered has increased by about 13% in 2018 compared to the year 2009, whilst production increased by 25%. This is mainly driven by the increasing demand of chicken meat.
1.3. Local consumption.

Over the past decades, there has been a rapid growth in consumption. Figure 4 below depicts local consumption of broiler meat comparing it to total production for a period of 10 years, 2008/09 to 2017/18.
Figure 4 shows that South Africa consumes more broiler meat than what is produced locally, which means the country is not self-sufficient and depends on the imports to meet local demand. During 2017/18, South Africa produced a total of 1.7 million tons of broiler, while its consumption was at 2.4 million tons on the same year. The gap between consumption and production continues to widen which cause South Africa to become the growing net importer of broiler meat during the period under review. The per capita consumption of broiler meat in South Africa has increased from 38.89 kg per person in 2016/17 to 42.32 kg per person in 2017/18, which marks approximately 9% increase. This may be because beef prices increased which encouraged the consumers to buy chicken as an alternative cheaper meat and health reasons. Broiler meat has the highest per capita consumption than all other meat. This is the case, as chicken remains the most affordable source of animal protein.

1.4. Employment

In 2018, it is estimated that broiler, hatchery and rearing industries employ 15 013 people, the processing sector employs a total of 28 578 people, and the broiler distribution industries employ 6 296 people. The grand total of employment within the broiler industry is 49 887 employees. The number of employment in field crops that are produced specifically for poultry feeds is 18 817.

2. MARKET STRUCTURE

The domestic market consists of approximately 265 formal abattoirs. These abattoirs sell mainly to 5 main retailers (Pick n Pay, Shoprite-Checkers, Spar, Woolworths and MassMart) and SMME’s in the retail sector. These retailers buy the largest share of domestic production. Figure 5 below shows the price movements from 2009 to 2018.

![Figure 5: Annual producer prices](Source: SAPA)
The average broiler producer price for this period was R16.70/kg per annum. The producer prices shows an increasing trend for the past decade, however the decline in 2010 was due to oversupply of broiler meat responding to the FIFA world cup held in South Africa and the low economic growth. The annual producer price in 2018 were R22.44/kg, which was R1.00 higher than 2017. Generally the price of broiler meat increased significantly mainly due to the increased input costs. For the past decade, the producer prices increase about R9.00, which is 64%.

2.2. Import – Export analysis.

Figure 6 compares quantities of imports and exports of broiler meat from 2009 to 2018.

![Figure 6: Broiler meat export and imports quantities](image)

Source: Quantec EasyData

Figure 6 indicates that from 2009 to 2018 South African is an increasing net importer of broiler meat as exports were far less than the imports. This is annual phenomenon and the situation might have been exaggerated by the alleged dumping of certain pieces of chicken from USA along with Brazil and EU import market for South Africa on poultry products.

2.2.1. Exports.

The broiler meat industry is also an earner of foreign exchange through the export of broiler meat. South Africa experienced a decrease of 21% of exports quantity and an increase of 13% in exports value in 2018 as compared to 2017.
Figure 7 below indicates the export of broiler meat from 2009 to 2018.

![Figure 7: Broiler meat exports](image)

Source: Quantec EasyData

Broiler meat exports quantity and value were fluctuating throughout the entire period of analysis. Broiler meat exports was on its lowest level in 2009 due to increased domestic demand. Although there is a fluctuating trend during the last six years of the decade, exports are still higher than at the beginning of the decade. From 2016 to 2018, the exports quantity is showing a declining trend which comes from the Highly Pathogenic Avian Influenza (HPAI) outbreak in June 2017. Most exported broiler meat is mechanically deboned meat and the cuts of offal that is fresh or chilled.

Figure 8 below shows the main SADC export market of South Africa’s broiler meat from 2009 to 2018.

![Figure 8: Broiler meat export to SADC](image)

Source: Quantec EasyData
Following the HAPAI outbreak in 2017, most of the SADC countries that are known to be main South African exports market suspended poultry imports from South Africa. The total decline from SADC in 2017 and 2018 were 25% and 38% respectively. Figure 8 above indicates that from SADC countries, Mozambique and Zimbabwe has been competing for dominance throughout the decade. Mozambique commanded the highest exports of South African broiler meat from 2011 to 2018, Zimbabwe was the highest commander of broiler meat from South Africa during 2009 and 2010. Mozambique has shown an immense increase of its imports share and reached peak in 2015 with almost 20 000 tons. South African meat exports to Mozambique decreased from 2015 to 2018. However, the country remained leading market within SADC with a share of more than 50%.

![Figure 8: Broiler meat exports to SADC countries](image)

It is clearly indicated from figure 9 above that, Saint Helena and Ghana competed for the greatest share of South African broiler meat exports. Ghana commanded the highest broiler meat exports during 2009 to 2012 and 2017 to 2018. Saint Helena commanded the second highest export shares of broiler meat from South Africa in 2012, 2014 and 2018 and was the highest in 2013 and 2015. Ethiopia has been importing smaller amounts of South African broiler meat for the past decade; however, the country commanded 62% share of imports during 2014. In total, the broiler meat exports to Middle, Eastern and Western area have decreased by 47% from 2017 to 2018.

![Source: Quantec EasyData](image)
Figure 10 above shows the main export destinations of South Africa’s broiler meat in 2018. Most of South African broiler meat was exported to Lesotho, which obtained 41% of South Africa’s broiler meat followed by Mozambique with 24% then Namibia and Botswana with 13% and 6% share respectively. The rest of the countries were 3% or less of South African broiler meat exports share during 2018. It is noted that South African broiler meat is exported mostly to SADC countries.

Values of broiler meat exports from various provinces of South Africa are presented in Figure 11.
Broiler meat exports is mainly from the Gauteng, Free State, Mpumalanga and KwaZulu-Natal Provinces. Gauteng Province has recorded the greatest values in broiler meat exports during the period under review with the highest value in 2011. This is because this province is the main exit point of exports in South Africa. Free State is the second greatest exporter; it recorded its high values during 2016 followed by Mpumalanga Province which recorded second high exports values from 2012 to 2015. Free State outstripped Gauteng Province and took a lead in 2015, 2016 and 2018. Intermittent exports were recorded from Eastern Cape, Northern Cape, North West and Limpopo Provinces.

The following figures (Figures 12 - 19) show the values of broiler meat exports from the various Districts in the nine Provinces of South Africa.

Figure 12 below show the broiler exports from Western Cape Province. The greatest shares of broiler meat exports value originates mainly from City of Cape Town Metropolitan Municipality. Minimal intermittent export values were recorded in West Coast, Cape Winelands, Overberg and Eden District Municipalities. West Coast District Municipality recorded some exports during 2014 to 2016; Cape Winelands District Municipality recorded in 2010, 2012 to 2018, whereas Overberg recorded in 2009, 2010 and 2016 to 2018. Lastly, Eden recorded exports in 2012 and 2016. City of Cape Town commanded a share of over 75% over the past decade.

![Figure 12: Values of broiler exports from Western Cape Province](image)

Source: Quantec EasyData

Figure 13, below present the broiler exports from Eastern Cape Province from 2009 to 2018.

In Free State Province, broiler meat exports were mainly from Mangaung and Thabo Mofutsanyane District Municipalities (see Figure 14 below). Mangaung District Municipality recorded exports values of broiler meat from 2009 to 2010 and again from 2012 to 2018. Xhariep District Municipality recorded exports from 2012 to 2018. Lejweleputswa and Fezile Dabi District Municipalities have recorded the exports from 2014 to 2018. Free State Province did not record broiler exports during 2011. Mangaung recorded a share of 100% in 2010. In 2015 and 2016, Thabo Mofutsanyane increased its exports and took a lead with a share of 49% and 50% respectively, followed by a drastic decline of 70% in 2017. In 2018, Mangaung kept leading with a broiler exports share of 63%, followed at a distance by Lejweleputswa and Thabo Mofutsanyane District municipalities by 23% and 12% respectively.
In the KwaZulu–Natal Province, exports of broiler meat were mainly from eThekwini District Municipality (see Figure 15 below). This district municipality have recorded exports for the past decade and commanded the greatest value of R650 million during the past decade. Followed at a distance by Umgungundlovu District Municipality with a value of R14 million, the district has shown exports of broiler meat from 2010 to 2018. EThekwini commanded a share of 100% in 2009 and over 95% from 2010 to 2018.

![Figure 15: Values of broiler exports from Kwa-Zulu Natal Province](image)

Source: Quantec EasyData

Within the North West province, all district municipalities reported irregular broiler exports (see Figure 16 below). Ngaka Modiri Molema shot up broiler exports in 2017 recording an increase of 1800% and increased again in 2018 by 30% reaching a new peak. Dr. Kenneth Kaunda District Municipality in North West Province commanded the highest export values from 2010 to 2011 and lastly 2014 and 2015. Bojanala District Municipality exported broiler meat in 2009, 2013, 2016 and 2018. There were no exports recorded in 2012 from North West Province. Ngaka Modiri Molema recorded broiler exports from 2015 to 2018.

![Figure 16: Values of broiler exports from North West Province](image)

Source: Quantec EasyData
In Gauteng Province, broiler meat exports arose mainly from City of Johannesburg, Ekurhuleni and City of Tshwane District Municipalities (see Figure 17). City of Johannesburg dominated the export market of broiler meat in Gauteng Province and commanded an export value of R3.8 billion for the past ten years. It commanded the greatest values from 2009 to 2014. Irregular exports were recorded from Sedibeng and West Rand District Municipalities. City of Johannesburg had a share of over 80% from 2009 to 2014. In 2015, 2016 and 2018 City of Tshwane was leading with a broiler exports share of 52%, 43% and 47% respectively. City of Johannesburg took back the lead with 56% share in 2017.

Source: Quantec EasyData

From Mpumalanga Province, Ehlanzeni District Municipality was the greatest exporter of broiler meat (see Figure 18). Ehlanzeni District Municipality increased exponentially from 2010 to 2014. Gert Sibande and Nkangala District Municipalities recorded fractional exports for the period under analysis. Gert Sibande District Municipality recorded exports of broiler meat during 2011, 2012 and from 2014 to 2018 while Nkangala District Municipality exported only in 2013, 2015 and 2018. Ehlanzeni recorded broiler export share of 100% from 2009 to 2010 and over 99% share from 2011 to 2018.

Source: Quantec EasyData
Figure 19 below indicates that, Limpopo Province experienced intermittent exports of broiler meat during the period under analysis. Mopani District Municipality recorded exports during 2014 and 2017; Vhembe recorded during 2010, 2011, 2015, 2016 and 2018. Capricorn District Municipality recorded during 2009 to 2011 and 2015 to 2018, whilst Waterberg recorded from 2014 to 2018. There was no exports record from Limpopo province during 2012 and 2013. Capricorn District Municipality recorded the highest export in 2010 with an export share of 85%. Vhembe was the major broiler exporter in 2017 with 62% of Limpopo province exports. In 2018, the total broiler exports from Limpopo declined by 95% from the previous year because of HPAI outbreak that led to exports ban.

![Figure 19: Values of broiler exports from Limpopo Province](image)

Source: Quantec EasyData

From Northern Cape Province, only Namakwa and Siyanda District Municipalities showed the exports of broiler meat under the period reviewed (See figure 20 below). Namakwa recorded exports in 2014 and 2016 whilst Siyanda recorded from 2015, 2016 and 2018. Namakwa showed 100% share of exports in 2014 and Siyanda in 2015. However, in 2018 Siyanda exports valued at above R3 million was recorded reaching new peak. There were no exports recorded in the province from 2009 to 2013 and again in 2017.

![Figure 20: Values of broiler exports from Northern Cape Province](image)

Source: Quantec EasyData
2.2.2. Imports

Figure 21 below show the imports of broiler meat from 2009 to 2018. South Africa imported approximately 537 000 tons of broiler meat in 2018 at an estimated value of R6 billion. The import of broiler meat quantity and value increased significantly from 2009 to 2018. This drastic increase is in line with the increasing consumption of broiler meat together with the stagnant production levels. However, from 2017 and 2018, the imports quantity and value were stagnant with an increase of just 3% and 1% respectively. The decline of imports quantity in 2017 and 2018 emanated from drastic decline of imports from EU. The EU experienced the Avian Influenza outbreak in December 2016, which led to South Africa imposing an import ban.

Figure 21: Broiler meat imports

Source: Quantec EasyData

Figures 22 - 25 below show the main suppliers of broiler meat from European Union, America, Asia and Oceania continents to South Africa during the period 2009 to 2018.

Figure 22: Quantities of broiler meat imports from the EU

Source: Quantec EasyData
The broiler meat imports from EU have dropped in 2017 and remained low in 2018 due to the ban that was imposed by South Africa on EU 28 because of HPAI outbreaks in Europe. Figure 22 clearly indicates that the import quantities of broiler meat from 2009 to 2010 from EU were very low, and started increasing in 2011. Netherlands commanded the highest imports from 2011 to 2016 and dropped drastically in 2017. United Kingdom commanded the second highest imports of broiler meat to South Africa from 2011 to 2014 and again in 2016. In 2015 and 2017, Belgium took the second position. Denmark and Ireland broiler exports to South Africa seem not to be affected by the HPAI outbreak. In 2018, both these countries broiler meat imports share within EU accounted for 46% and 45% respectively. The lowest imports received during the past decade were from Portugal, Hungary and France.

Figure 23 below present the quantity of broiler meat imports from Americas from 2009 to 2018.

![Figure 23: Quantities of broiler meat imports from Americas](chart)

Source: Quantec EasyData

Figure 23 shows the quantities of broiler meat imported by South Africa from Americas during the past decade. During the past decade, Brazil commanded the highest quantities of South Africa’s import market of broiler meat with a share of over 70%. Imports of broiler meat from Brazil increased by 47% in 2017 following EU’s loss of SA market because of the HPAI outbreak. Generally, Brazil is the main supplier of broiler meat to South Africa within the Americas continent and it is one of the highest producer of broiler meat in the world. Argentina was a second leading import supplier from 2009 to 2015. In 2016, United State of America (USA) overtook the second position by gaining market access through AGOA agreement about the duty free import quota and free for anti-dumping duty in South Africa.
Figure 24 below present the quantity of broiler meat imports from Asia from 2009 to 2018.

It is clear from the Figure 24 that, Thailand was the main supplier of broiler meat to South Africa. This country was the largest from 2011 to 2018. In total, Thailand commanded a volume of 34 545 tons; followed by United Arab Emirates (UAE), which commanded 675 tons and Israel with 571 tons of broiler meat exported to South Africa over the period under review. Although Thailand has been the biggest contributor of broiler exports, in 2014, the imports shown a drastic decrease of 88% from previous year. However, in 2015, imported quantity have shown an immense increase and dropped again in 2016. For the past 3 years, Thailand commanded a 100% share of imports within Asia.

Figure 25 below present the quantity of broiler meat imports from Oceania from 2009 to 2018.
It is clearly indicated from Figure 25 above that in Oceania continent, Australia is the main exporter of broiler meat to South Africa. Australia was on a peak with imports in 2009. South Africa received the least imports of broiler meat from New Zealand. Overall imports from Oceania in 2015 were zero and in 2016 increased to 166 tons, followed by another increase to 962 in 2017. In 2018, Australia experience a decline but still had a 100% share of broiler meat demanded by South Africa from Oceania.

Figure 26 shows the countries of origin for the imported broiler meat during 2018.

Figure 26: Origin of broiler meat imports during 2018

Source: Trade map

Figure 26 above shows the share of various suppliers of broiler meat to South Africa’s in 2018. Brazil commanded the highest market share of broiler meat imports in South Africa, leading with 63% share. The broiler meat product imported from Brazil were frozen meat, cut and not cut in pieces. Brazil was followed at a distance by the United States of America with 16% and Argentina with 6%. Minimal imports were from Spain and Thailand.
3. BROILER MEAT MARKET VALUE CHAIN

Figure 27: Structure of the broiler meat industry.

2.39 million tons of Domestic Consumption
Per Capita Consumption = 42.32 kg / year
(Estimate for 2018)

Abattoirs
A: 0
B: 29
C: 102
D: 60
E: 68
Total: 265

Import: 537 million Kg

Retail

Import

Abattoirs

Export

Domestic Production

Export: 51 million kg

Commercial Production: 983 million broilers slaughtered in 2018

207 Broiler meat contract growers:
Early Bird 82
Country Bird 56
Rainbow 42

37 Breeders: 3 primary: Cobb
Ross and Hybro
Multipliers: 34

SMMEs: 28% or 4,983,906 broiler meats sold per week.

Breeders

Feed companies

Farms

Feed companies:
Meadow
Epol
Afgri

24 remaining mills: 25% of industry

Total Production: DAFF Sector for Agriculture/Livestock 32% of the National flock is contributed by SMME’s Indigenous fowls sustenance farming.

- SAPA Stats (Commercial only) 8 producers handle 72% of total Broiler meat supply to RSA SMMEs (<200,000 broiler meats slaughtered or sold per week) handle 28%

Source: Adapted from NAMC.
South African broiler meat value chain consists of broiler meat farms and contract growers, feed companies and other input suppliers and breeders. Some of the feed companies are vertically integrated with the large commercial producers. There are abattoirs, importers, exporters and retailers on the secondary sector. There is 2.39 million tons of domestic consumption with a per capita consumption of 42.32 kg. Production is around 1.7 million tons, Imports 537 million kilograms and Export 51 million kilograms.
4. MARKETING CHANNELS FOR BROILER MEAT.

Figure 28: Marketing Channels.

From Figure 28, broiler meat production is by two sectors: commercial and small scale. Live broiler meat is marketed mainly through two channels, live broiler meat market and abattoirs. Majority of broiler meat from commercial is sold through abattoirs while small scale through live broiler meat market. Live broiler meat market depends on hawkers and small retailers for distribution to final consumers. Abattoirs slaughters broiler meat and sell it as carcass to processors and packers, who sell chicken fresh, frozen or further processed, sell to retailers or further processors and exports some of the chicken. Processors, packers, and further processors also rely on imports for their supplies. Further processors sell to retailers for final distribution to the consumer.
5. **EMPOWERMENT STRATEGIES BY THE INDUSTRY AND GOVERNMENT.**

- The Land Bank sponsors the distribution of broiler meat bulletin to developing farmers.
- Sector for Education and Training (SetaSA) sponsors training under the National Skills Broiler Project Fund.
- Rocklands broiler meat has entered into a R20-million joint venture with BEE company Kamnandi Trading to produce 265 000 live birds every eight weeks in the Eastern Cape town of Loerie over 20 years.
- Vukanathi Broiler Project in North West is presently an out grower for Country Bird. Country Bird provides the day old chicks, medicine, feed and the market to the project. In 2006, the venture was transformed into black employment equity (BEE) entity that required Thembani’s assistance as guarantor to secure a working capital and growth line of credit. The Vukanathi project will own 72% of the equity of the business and effectively transform the venture into a BEE entity, with a strategic partner owning 28% of this venture.
- The South African Broiler Association (SAPA) was the catalyst in the formation of the Developing Broiler Farmers Organization (DPFO). The main objective of the DPFO is to serve as a conduit to the developing broiler farmers for information dissemination and to co ordinate and address collective issues in the industry.

**Possible market entry for SMME**

- Contract growing.
- Empowerment purchases of existing operation’s farms by workers.
- Strategic partnerships – not for beginner farmers.
- Resource centers in the form of central distribution points that will allow farmers to organize into buyer groups or small cooperatives.

6. **BARRIERS TO PARTICIPATION BY THE EMERGING SECTOR.**

The transaction costs of the emerging farmers are much higher than those of their large developed counterparts in the commercial sector.

The availability of day-old chicks is a problem because the big producers are given preference. The long distances from the suppliers to the farms could result in high fatalities.

The lack of abattoirs/slaughter houses to market/sell dressed chickens in the formal markets. The lack of bar coding facilities and proper freezers to store dressed birds. Most retail companies look for bar coded products for traceability.

The volumes produced and their location places them at a disadvantage to supply to the retail sector. Hence, many farmers sell live birds to the informal sector.
Other constraints that affect the industry

- Low priced and high growth of imports.
- Sanitary and Phytosanitary Standards.
- Exchange rate fluctuations.
- Chick Costs are high.
- Higher input costs, especially feed prices.
- Lack of Finance as small scale farmers do not meet the requirements set by the commercial banks.
- Lack of Health Control, as state veterinarians are not trained in broiler or available when needed.
- Lack of Marketing Skills.

- Lack of Technical Training.
- Lack of strong Farmer Organization, support structures and mentorship.
- The significant growth in volume of imports into South Africa.
- Continuous threat of poultry diseases, especially the new variant of IB prevalent in SA.
- Negative media comments around the practice of brining are a potential crisis for the industry.
7. OPPORTUNITIES AND WEAKNESSES

The per capita consumption increased during 2018 and was 42.32 kg per person. If this trend continues, this is an opportunity for new entrants and the growth of existing broiler farmers in the industry.

The per capita broiler meat consumption is set to increase further with the redistribution of wealth, recovery of the economy and the increase in the level of disposable income. With the redistribution of wealth, the per capita income of the nation has resulted in an upward movement of individuals in the pyramid of purchasing power. These results in the demands increasing hence individuals would include more broiler meat in their regular meals.

There are 35 producers who deliver 61% of the total broiler meat market. Imports control 27% of the market. The balance 12% is being supplied by hundreds of small/emerging farmers. New entrants are free to enter but are limited in terms of capital, expertise and the availability of day-old chicks.

Another inhibiting factor to the growth of the emerging sector is the lack of abattoirs to slaughter and sell their products to the retail sector. Their volumes are too small to warrant the capital outlay for the establishment of an abattoir. Thus, many emerging farmers sell their products in the informal sector as live birds.

The quality standards and bar coding are pre-requisites by most retail companies. This is thus an area that can be jointly addressed by government and the industry. This intervention could assist with the growth of the domestic supply and could ultimately reduce imports. Some farmers lack the knowledge/expertise on handling diseases on their farms.
8. MARKET INTELLIGENCE

8.1. Export tariffs for broiler meat.

Tariffs from different importing countries applied to broiler meat originating from South Africa in 2017 and 2018 are shown in Table 1 below.

Table 1: Broiler meat export tariffs

<table>
<thead>
<tr>
<th>Importers</th>
<th>Product Code</th>
<th>Trade Regime Description</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Applied Tariffs</td>
<td>Total Ad Valorem Equivalent Tariff (estimated)</td>
</tr>
<tr>
<td>Lesotho Namibia Botswana</td>
<td>02071100; 02071200; 02071300; 02071400; 02072400; 02072500; 02072600; 02072700; 02073200; 02073300; 02073400; 02073500 &amp; 02073600</td>
<td>Intra SACU rate</td>
<td>0% 0%</td>
<td>0% 0%</td>
</tr>
<tr>
<td>Mozambique</td>
<td>02071100; 02071200; 02071300; 02071400; 02072400; 02072500; 02072600; 02072700; 02073200; 02073300; 02073400; 02073500 &amp; 02073600</td>
<td>Preferential tariff for South Africa</td>
<td>0% 0%</td>
<td>0% 0%</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>02071100; 02071200; 02071300; 02071400; 02072400; 02072500; 02072600; 02072700; 02073200; 02073300; 02073400; 02073500 &amp; 02073600</td>
<td>Preferential tariff for South Africa</td>
<td>0% 0%</td>
<td>0% 0%</td>
</tr>
</tbody>
</table>

Source: MacMap

Most of South Africa’s broiler meat is exported to SADC. Lesotho, Namibia and Botswana have applied Intra SACU rate tariff regime which is 0% for traded products. Zimbabwe applied a 0% preferential tariff for South Africa in 2017 and 2018. Mozambique applied 0% of preferential tariff for South Africa in 2017 and 2018.
8.2. Import tariffs for broiler meat.

Tariffs that South Africa applied to imports of broiler meat originating from all possible countries in 2018 is shown in Table 2 below.

Table 2: Broiler meat import tariffs

<table>
<thead>
<tr>
<th>Article Description</th>
<th>Statistical unit</th>
<th>General rate</th>
<th>EU rate</th>
<th>EFTA rate</th>
<th>SADC rate</th>
<th>MERCOSUR rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>0207.00</td>
<td>Meat and edible offal, of the poultry of heading 01.05, fresh, chilled or frozen:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0207.10</td>
<td>Of fowls of the species Gallus domesticus:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0207.11</td>
<td>Not cut in pieces, fresh or chilled</td>
<td>Kg</td>
<td>free</td>
<td>free</td>
<td>free</td>
<td>free</td>
</tr>
<tr>
<td>0207.12</td>
<td>Not cut in pieces, frozen:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0207.13</td>
<td>Mechanically deboned meat</td>
<td>Kg</td>
<td>free</td>
<td>free</td>
<td>free</td>
<td>free</td>
</tr>
<tr>
<td>0207.14</td>
<td>Carcasses (excluding necks and offal) with all cuts (e.g. thighs, wings, legs and breasts) removed</td>
<td>Kg</td>
<td>31%</td>
<td>free</td>
<td>31%</td>
<td>free</td>
</tr>
<tr>
<td>0207.15</td>
<td>Other</td>
<td>Kg</td>
<td>82%</td>
<td>free</td>
<td>82%</td>
<td>free</td>
</tr>
<tr>
<td>0207.16</td>
<td>Cuts and offal, fresh or chilled</td>
<td>Kg</td>
<td>free</td>
<td>free</td>
<td>free</td>
<td>free</td>
</tr>
<tr>
<td>0207.17</td>
<td>Cuts and offal, frozen:</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>0207.18</td>
<td>Boneless cuts:</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>0207.19</td>
<td>Breast</td>
<td>Kg</td>
<td>12%</td>
<td>free</td>
<td>12%</td>
<td>free</td>
</tr>
<tr>
<td>0207.20</td>
<td>Thighs</td>
<td>Kg</td>
<td>12%</td>
<td>free</td>
<td>12%</td>
<td>free</td>
</tr>
<tr>
<td>0207.21</td>
<td>Other</td>
<td>Kg</td>
<td>12%</td>
<td>free</td>
<td>12%</td>
<td>free</td>
</tr>
<tr>
<td>0207.22</td>
<td>Offal:</td>
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</tr>
<tr>
<td>0207.23</td>
<td>Livers</td>
<td>Kg</td>
<td>30%</td>
<td>free</td>
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<td>free</td>
</tr>
<tr>
<td>0207.24</td>
<td>Feet</td>
<td>Kg</td>
<td>30%</td>
<td>free</td>
<td>30%</td>
<td>free</td>
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<tr>
<td>0207.25</td>
<td>Heads</td>
<td>Kg</td>
<td>30%</td>
<td>free</td>
<td>30%</td>
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<tr>
<td>0207.26</td>
<td>Other</td>
<td>Kg</td>
<td>30%</td>
<td>free</td>
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<td>0207.27</td>
<td>Other:</td>
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<td>0207.28</td>
<td>Whole bird cut in half</td>
<td>Kg</td>
<td>37%</td>
<td>free</td>
<td>37%</td>
<td>free</td>
</tr>
<tr>
<td>0207.29</td>
<td>Leg quarters</td>
<td>Kg</td>
<td>37%</td>
<td>free</td>
<td>37%</td>
<td>free</td>
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<tr>
<td>0207.30</td>
<td>Wings</td>
<td>Kg</td>
<td>37%</td>
<td>free</td>
<td>37%</td>
<td>free</td>
</tr>
<tr>
<td>0207.31</td>
<td>Breasts</td>
<td>Kg</td>
<td>37%</td>
<td>free</td>
<td>37%</td>
<td>free</td>
</tr>
<tr>
<td>0207.32</td>
<td>Thighs</td>
<td>Kg</td>
<td>37%</td>
<td>free</td>
<td>37%</td>
<td>free</td>
</tr>
<tr>
<td>0207.33</td>
<td>Drumsticks</td>
<td>Kg</td>
<td>37%</td>
<td>free</td>
<td>37%</td>
<td>free</td>
</tr>
<tr>
<td>0207.34</td>
<td>Other</td>
<td>Kg</td>
<td>37%</td>
<td>free</td>
<td>37%</td>
<td>free</td>
</tr>
</tbody>
</table>

Source: SARS
Table 2 indicate the tariff duties applied by South Africa to trade agreement members of EU, EFTA, SADC, MERCOSUR and General members on sub products of fowls of the species Gallus domesticus, broiler meat. South Africa applied duty free from both EU and SADC members due to its trade agreements. As per the table, South Africa applied different percentage charges according to different sub products to (EFTA, MERCOSUR and General Members of WTO). The total annual quota allocated for these products is applied only in USA through AGOA which is 65 000 tons per annum.
9. PERFORMANCE ANALYSIS OF SOUTH AFRICAN POULTRY INDUSTRY IN 2018.

Table 3: List of importing markets for the Meat & edible offal of broiler exported by South Africa in 2018.
South Africa’s exports represent 0.3% of world exports for Meat & edible offal of broiler, its ranking in world’s exports is 31.

<table>
<thead>
<tr>
<th>Importers</th>
<th>Value exported in 2018 (USD thousand)</th>
<th>Trade balance 2018 (USD thousand)</th>
<th>Share in South Africa’s exports (%)</th>
<th>Quantity exported in 2018</th>
<th>Quantity unit</th>
<th>Unit value (USD/unit)</th>
<th>Growth in exported value between 2014-2018 (% p.a.)</th>
<th>Growth in exported quantity between 2014-2018 (% p.a.)</th>
<th>Growth in exported value between 2017-2018 (% p.a.)</th>
<th>Ranking of partner countries in world imports</th>
<th>Total imports growth in value of partner countries between 2014-2018 (% p.a.)</th>
<th>Average distance between partner countries and all their supplying markets (km)</th>
<th>Concentration of all supplying countries of partner countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>83994</td>
<td>-406571</td>
<td>100</td>
<td>51779 Tons</td>
<td>Tons</td>
<td>1622</td>
<td>-3</td>
<td>-7</td>
<td>-15</td>
<td>1</td>
<td>369</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Lesotho</td>
<td>33888</td>
<td>33874</td>
<td>40.3</td>
<td>21023 Tons</td>
<td>Tons</td>
<td>1612</td>
<td>1</td>
<td>-2</td>
<td>6</td>
<td>78</td>
<td>1</td>
<td>8167</td>
<td>0.13</td>
</tr>
<tr>
<td>Mozambique</td>
<td>23388</td>
<td>23388</td>
<td>27.8</td>
<td>12240 Tons</td>
<td>Tons</td>
<td>1911</td>
<td>-6</td>
<td>-8</td>
<td>-22</td>
<td>111</td>
<td>-20</td>
<td>6705</td>
<td>0.19</td>
</tr>
<tr>
<td>Namibia</td>
<td>10105</td>
<td>10105</td>
<td>12</td>
<td>6687 Tons</td>
<td>Tons</td>
<td>1511</td>
<td>-11</td>
<td>-13</td>
<td>-37</td>
<td>76</td>
<td>9</td>
<td>6705</td>
<td>0.19</td>
</tr>
<tr>
<td>Botswana</td>
<td>5282</td>
<td>5282</td>
<td>6.3</td>
<td>3127 Tons</td>
<td>Tons</td>
<td>1689</td>
<td>1</td>
<td>-1</td>
<td>7</td>
<td>140</td>
<td>7</td>
<td>1860</td>
<td>0.61</td>
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<tr>
<td>United Arab Emirates</td>
<td>2200</td>
<td>2200</td>
<td>2.6</td>
<td>1179 Tons</td>
<td>Tons</td>
<td>1866</td>
<td>247</td>
<td>209</td>
<td>1115</td>
<td>10</td>
<td>0</td>
<td>9947</td>
<td>0.55</td>
</tr>
<tr>
<td>DRC</td>
<td>1992</td>
<td>1992</td>
<td>2.4</td>
<td>1618 Tons</td>
<td>Tons</td>
<td>1231</td>
<td>31</td>
<td>39</td>
<td>5</td>
<td>48</td>
<td>2</td>
<td>6154</td>
<td>0.11</td>
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<tr>
<td>Eswatini</td>
<td>1871</td>
<td>1114</td>
<td>2.2</td>
<td>1992 Tons</td>
<td>Tons</td>
<td>939</td>
<td>-1</td>
<td>6</td>
<td>-23</td>
<td>169</td>
<td>-3</td>
<td>8631</td>
<td>0.43</td>
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<tr>
<td>Zambia</td>
<td>1527</td>
<td>1527</td>
<td>1.8</td>
<td>1416 Tons</td>
<td>Tons</td>
<td>1078</td>
<td>2</td>
<td>-17</td>
<td>-19</td>
<td>132</td>
<td>22</td>
<td>6709</td>
<td>0.18</td>
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<tr>
<td>Zimbabwe</td>
<td>919</td>
<td>919</td>
<td>1.1</td>
<td>1227 Tons</td>
<td>Tons</td>
<td>749</td>
<td>-28</td>
<td>-32</td>
<td>-74</td>
<td>161</td>
<td>-15</td>
<td>2386</td>
<td>0.4</td>
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<tr>
<td>Angola</td>
<td>732</td>
<td>732</td>
<td>0.9</td>
<td>306 Tons</td>
<td>Tons</td>
<td>2392</td>
<td>37</td>
<td>33</td>
<td>-38</td>
<td>14</td>
<td>-1</td>
<td>9594</td>
<td>0.4</td>
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<tr>
<td>Ghana</td>
<td>368</td>
<td>368</td>
<td>0.4</td>
<td>111 Tons</td>
<td>Tons</td>
<td>3315</td>
<td>126</td>
<td>143</td>
<td>-34</td>
<td>45</td>
<td>45</td>
<td>6248</td>
<td>0.25</td>
</tr>
</tbody>
</table>

Source: ITC calculations based on COMTRADE statistics.
Table 3 shows that during 2018, South Africa exported a total of 51,779 tons of meat & edible offal of broiler at a unit value of US$ 1,622/unit. The major export destinations for meat & edible offal of broiler originating from South Africa during 2018 were Lesotho, Mozambique and Namibia. The greatest share of South Africa’s meat & edible offal of broiler exports in value were exported to Lesotho which commanded a share of 40.3% during the year 2018 followed by Mozambique and Namibia which commanded 27.8% and 12% respectively.

South Africa’s meat & edible offal of broiler exports decreased by 3% in value and 7% in quantity between the periods 2014 and 2018. During the same period, exports for meat & edible offal of broiler to Lesotho increased by 1% in value and decreased by 2% in quantity.

Between the periods 2017 and 2018, South Africa’s exports value of meat & edible offal of broiler decreased by 15%. During the same period, exports value of meat & edible offal of broiler to Lesotho increased by 6% and Mozambique experienced an decrease of 22%.
Figure 29: Growth in demand for poultry meat exported by South Africa in 2018

Source: Trademap, ITC
Figure 29 illustrates that between 2014 and 2018 South Africa’s meat & edible offal of broiler exports to DRC, Angola, Mozambique and UAE were growing at a rate that is more than their import growth from the rest of the world. Zimbabwe and Mozambique represented loss of South African exports by 28% and 6% per annum respectively during the period 2014-2018.

South Africa’s meat & edible offal of broiler exports to Botswana, Gabon, Zambia, Namibia and Lesotho were growing at a rate that is less than their imports from the rest of the world during 2014-2018. The most growing demand of South African meat & edible offal poultry is from UAE with an annual growth of South African exports of 247%.
Figure 30: Prospects for market diversification for poultry meat exported by South Africa in 2018

Source: Trademap, ITC
Figure 30 above shows the prospects for market diversification for meat & edible offal of broiler exports by South Africa in 2018. The analysis of the results as shown on the figure above indicates that Lesotho commanded the greatest shares (40.35%) of South Africa's meat & edible offal of broiler exports during the year 2018. Mozambique followed with a share of 27.84%

If South Africa is to diversify its meat & edible offal of broiler exports, the fastest growing markets exist in Argentina. The country's annual import growth is at 57% per annum respectively during 2014 to 2018. South Africa may penetrate this market due to its imports growth.
Table 4: List of supplying markets for Meat & edible offal of broiler imported by South Africa in 2018

South Africa’s imports represent 1.9% of world’s imports of Meat & edible offal of broiler, its ranking in world’s imports is 13.

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
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<td>Brazil</td>
<td>276588</td>
<td>-276366</td>
<td>56.4</td>
<td>347638</td>
<td>Tons</td>
<td>796</td>
<td>27</td>
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<td>1</td>
<td>-3</td>
<td>12600</td>
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<tr>
<td>United States of America</td>
<td>76676</td>
<td>-76637</td>
<td>15.6</td>
<td>91374</td>
<td>Tons</td>
<td>839</td>
<td>209</td>
<td>212</td>
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<td>2</td>
<td>-6</td>
<td>7137</td>
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<td>Denmark</td>
<td>34368</td>
<td>-34368</td>
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<td>25672</td>
<td>Tons</td>
<td>1339</td>
<td>46</td>
<td>42</td>
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<td>25</td>
<td>-2</td>
<td>3520</td>
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<td>Ireland</td>
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<td>Argentina</td>
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<td>33278</td>
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<td>-5</td>
<td>2492</td>
<td>0.1</td>
<td></td>
</tr>
</tbody>
</table>

Sources: ITC calculations based on COMTRADE statistics.
Table 4 shows that during 2018 South Africa imported a total of 565,427 tons of meat & edible offal of broiler at an average value of US$ 868/unit. The major origins for meat & edible offal of broiler imported by South Africa during 2018 were Brazil, USA, Belgium and Ireland. The greatest share of South African meat & edible offal of broiler imports were from Brazil that commanded 56.4% during 2018 followed by USA with 15.6%, Denmark and Ireland with 7% and 6.6% respectively.

South Africa’s meat & edible offal of broiler imports increased by 8% in value and increased by 9% in quantity between the periods 2014 and 2018. During the same period, imports of meat & edible offal of broiler from Brazil also increased by 27% in value and 20% in quantity while imports from USA increased by 209% in value and increased by 212% in quantity.

Between the period 2017 and 2018 South Africa’s imports for meat & edible offal of broiler increased by 2% in value. During the same period, imports of meat & edible offal of broiler from Brazil increased by 5% and USA increase by 3% in value.
Figure 31: Competitiveness of suppliers to South Africa for poultry meat imported in 2018

Source: Trademap, ITC
Figure 31 illustrates that between 2014 and 2018 South Africa’s meat & edible offal of broiler imports from Germany, Netherlands, United Kingdom, Belgium, Austria and Spain were growing at a rate that is less than their export growth to the rest of the world. During the same period, South Africa’s meat & edible offal of broiler imports from Brazil, USA, Chile, Thailand, Australia, Ireland, Canada, Argentina and Denmark were growing at a rate that is greater than their exports to the rest of the world.

Generally, the most competitive markets were United States of America (USA) with the annual import growth to South Africa of 209% respectively with the world export market share of 13.45%.
Figure 32: Prospects for diversification of suppliers for poultry meat imported by South Africa in 2018

Source: Trademap, ITC
Figure 32 above shows the prospects for diversification of suppliers for meat & edible offal of broiler imports by South Africa in 2018. The analysis of the results as shown on the figure shows that Brazil commanded the greatest shares (56.38%) in South Africa’s meat & edible offal of broiler imports during the year 2018 followed by USA (15.63%). They are both exporting more meat & edible offal of poultry meat to South Africa than to the rest of the world.

If South Africa is to diversify its meat & edible offal of broiler imports, Brazil remains a traditional supplier, however other possible suppliers can be Eswatini due to its high annual exports growth of 23%. 
10. ACKNOWLEDGEMENTS

Agricultural Statistics
Tel: 012 319 8453
Fax: 012 319 8031

Market Access Map
www.macmap.org.

Broiler Site
www.thepoultrysite.com

Quantec Easydata
www.easydata.co.za

South African Poultry Association (SAPA)
P.O. Box 1192
Honeydew, 2040
Tel: 011-795 2051
Fax: 011-795 3180

TradeMap

Disclaimer:
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