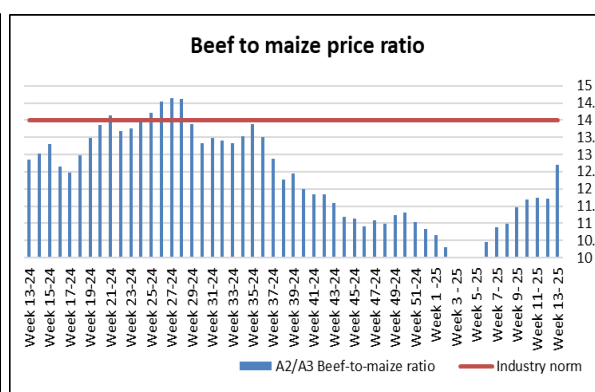
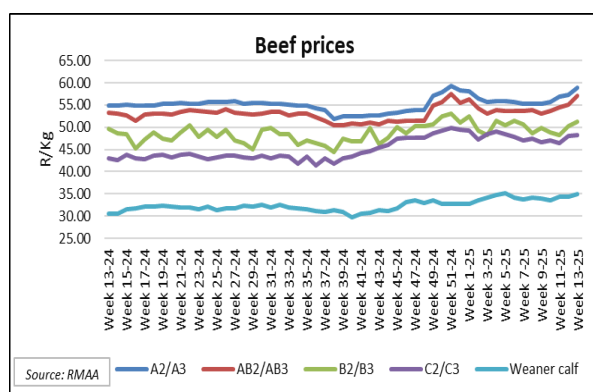




## Summary

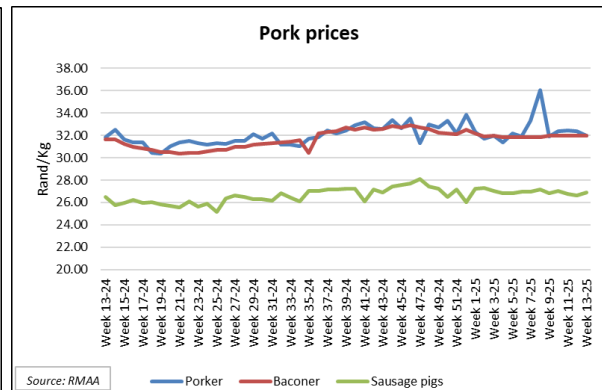
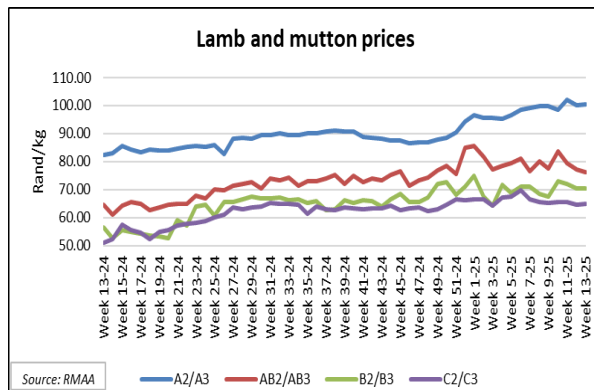
Outbreaks of foot and mouth disease (FMD) have been reported in the Newcastle Local Municipality of the KwaZulu-Natal province. Officials have had to act swiftly as the outbreaks have now spread beyond the original confines of the Disease Management Area (DMA). To prevent further transmission of the virus, the Minister of Agriculture, Mr John Steenhuisen, has declared an extension of the DMA to cover all affected areas. The Department of Agriculture announced that this extended DMA will govern the movement of cloven-hoofed animals, such as cattle, sheep, and goats, together with their products. The livestock subsector is facing another biosecurity threat from bird flu (avia influenza). As we enter the cooler seasons, the risk of bird flu outbreaks tends to increase as the vectors of the virus, wild birds, migrate from Europe. Bird flu is arguably the most serious disease in poultry, with mortality rates in unvaccinated birds being as high as 100% within a short space of time. While discussions around vaccination protocols are ongoing, current protocol requirements for vaccination of poultry are reported to be too rigorous to meet for even the most advanced farms. The industry is actively working with the Department of Agriculture to create feasible vaccination policies that balance biosecurity with economic viability.

## The beef industry



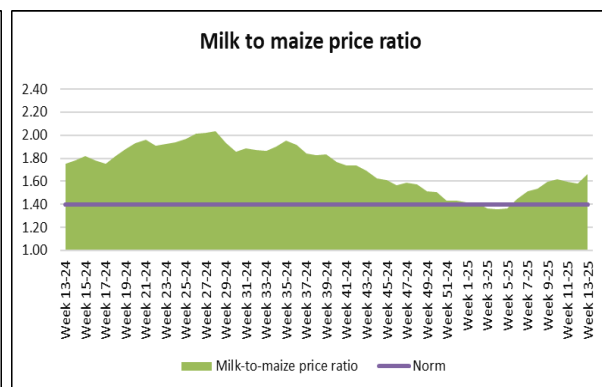
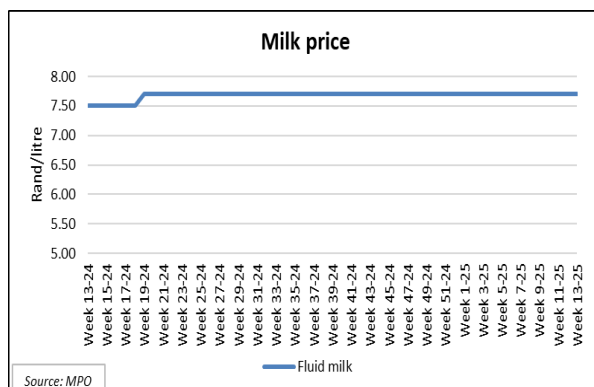
- **Beef prices** were largely bullish week-on-week (w/w).
- The average prices of class A2/A3 and AB2/AB3 increased by 2.7% and 3.6% w/w to R58.82/kg and R57.03/kg, respectively.
- The average prices of class B2/B3 and C2/C3 increased by 2.2% and 0.6% w/w to R51.24/kg and R48.02/kg, respectively.
- On average, beef prices were 7.4% higher year-on-year (y/y) due to improved demand.
- The average **weaner price** increased by 1.5% w/w to R34.98/kg due to improved demand for weaners on the market.
- In the past week, the average **beef-to-maize price ratio** increased by 8.5% to 12.7 due to a decrease in the average yellow maize price by 5.4% w/w.

# The mutton and pork industries



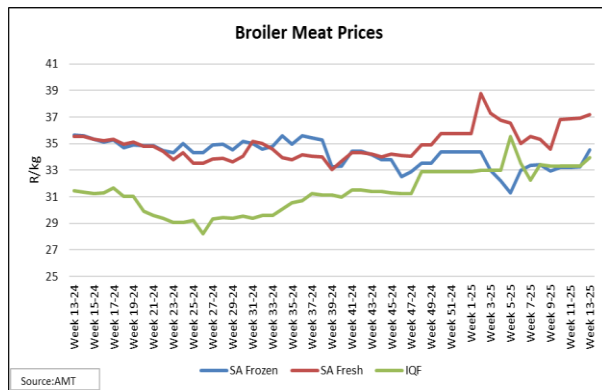
- **Mutton and lamb prices** traded mixed w/w.
- The average price of class A2/A3 increased by 0.3% w/w to R100.44/kg, while AB2/AB3 decreased by 1.2% w/w to R76.27/kg.
- The average price of class B2/B3 decreased by 0.1% to R70.45/kg, while class C2/C3 increased w/w by 0.7% to R65.09/kg.
- The average mutton and lamb prices were 22.9% higher y/y due to improved demand.
- The **pork prices** also traded mixed w/w.
- The average price of porkers decreased by 1.1% w/w to R31.97/kg.
- The average price of baconers remained flat at R31.97/kg, while sausage increased by 1.1% w/w to R26.92/kg.
- On average, pork prices were 1% higher y/y.

# The dairy industry



- The latest average **milk producer price** set by dairy processors is estimated at R7.71/l.
- In the past week, the average **milk-to-maize price ratio** increased by 5.6% w/w to 1.6.
- The increase in the milk-to-maize price ratio was due to the 5.4% w/w decrease in the average yellow maize price.
- The average milk-to-maize price ratio is above its long-term average of 1.4.

# The broiler industry



- **Broiler prices** were bullish w/w.
- The average prices of **South African frozen** and **fresh chicken** increased by 3.7% and 0.6% w/w to R34.51/kg and R37.16/kg, respectively.
- The average price of **IQF chicken** increased by 2% w/w to R33.96/kg.
- Average chicken prices were up by 3.1% on an annual basis.

# The wool industry

Indicator	SA prices (R/kg)		Change
	Previous	Current	
Clean non-RWS certified wool	184.17	184.80	↑ 0.3%
Clean RWS certified wool	188.25	189.31	↑ 0.6%

- The latest **wool auction** took place on 02 April 2025, with 7 689 bales of wool on offer
- There was a good competition from the wool buyers supported by the weaker rand.
- Approximately 98.1% of the wool that was on offer was sold during the auction.
- Compared to the previous auction, the **non-RWS** (Responsible Wool Standard) and the **RWS** increased by 0.3% and 0.6% to R184.80/kg and R189.31/kg, respectively.
- The next wool auction is expected to take place on the 16 April 2025.

# Mohair industry

Commodity	Rand/kg			Change from previous	Change (y/y)
	Last year	Previous	Current		
<b>Mohair</b>					
Kids	670.61	677.08	677.58	↑ 0.1%	↑ 1.0%
Young Goats	395.87	346.07	346.42	↑ 0.1%	↓ -12.5%
<b>Adults:</b>					
- Fine	363.09	331.39	311.39	↓ -6.0%	↓ -8.7%
- Strong	327.91	298.29	292.38	↓ -2.0%	↓ -9.0%

- The third **mohair sale** of the 2025 summer season took place on 25 March 2025, with 184 947 kg of mohair on offer.
- Not all buyers were active at the sale.
- Approximately 96% of the mohair that was offered was sold during the sale.
- About 90% of the mohair that was offered during the sale was **RMS** (Responsible Mohair Standard) certified.
- Both average prices of **kid** and **young goat** mohair increased by 0.1% compared to the previous sale.
- The average prices of **adult fine** and **adult strong** mohair decreased by 6% and 2% compared to the previous sale, respectively.
- The fourth sale of the 2025 summer season is expected to take place on 15 April 2025.

### Sources

*Agri-Market Trends.*

*Cape Wools South Africa*

*Department of Agriculture Land Reform and Rural Development.*

*Grain South Africa.*

*Milk Producers Organisation.*

*Mohair South Africa.*

*Red Meat Abattoir Association.*

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