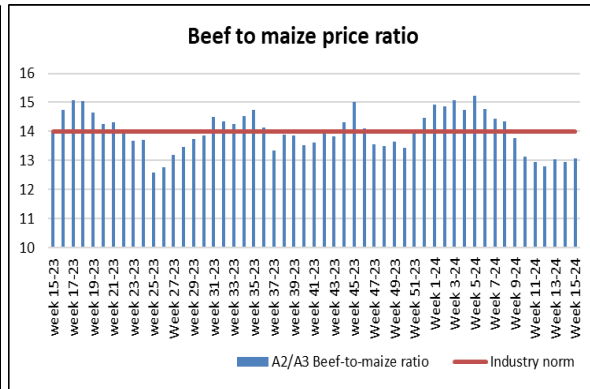
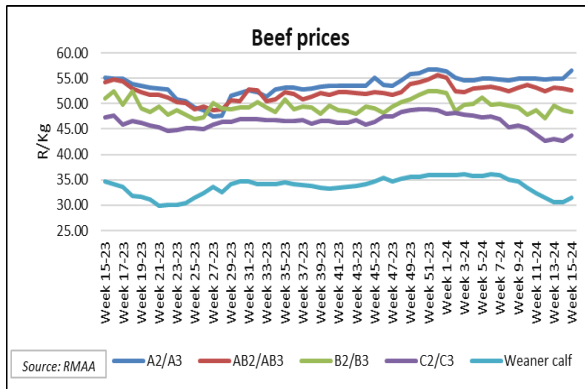




Summary

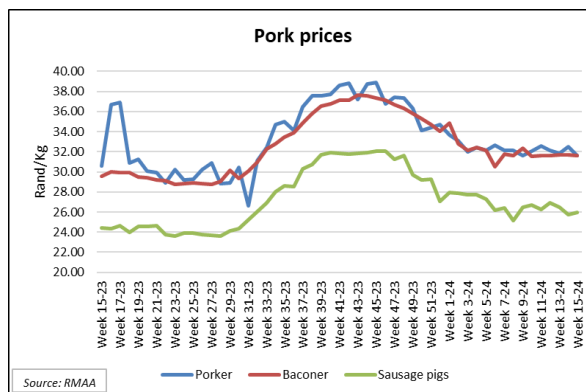
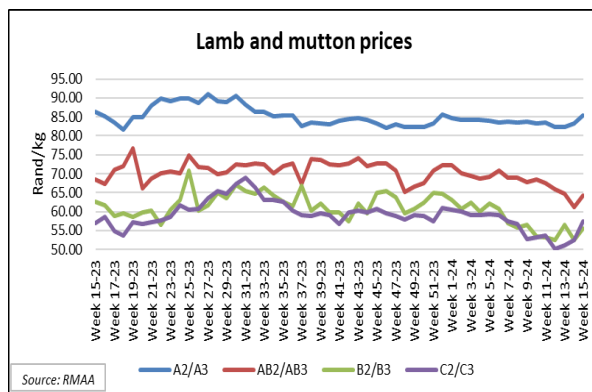
The incidence of livestock disease outbreaks still poses a risk to the domestic livestock subsector. Farmers are advised to remain vigilant and continue to practice strict biosecurity measures. Of late there have been fewer livestock disease outbreaks reported around the country. However, the incidence of bird flu outbreaks is higher during the cooler seasons, especially winter. Therefore, the risk of bird flu outbreaks should invariably increase in South Africa as we approach winter. Since November 2023 to date, a maximum of two cases of bird flu outbreaks have been reported on a weekly basis, as the industry has been able to manage the situation. In the case of foot and mouth disease (FMD), the latest report from the Department of Agriculture, Land Reform, and Rural Development (DALRRD) indicates that the last FMD outbreak was reported in the Free State in February 2024. Currently, about seven provinces (the Eastern Cape, Northern Cape, Western Cape, Gauteng, Limpopo, Mpumalanga, and the North West) have been declared as either having no FMD outbreaks or the cases have been resolved according to the World Organisation for Animal Health (WOAH).

The beef industry



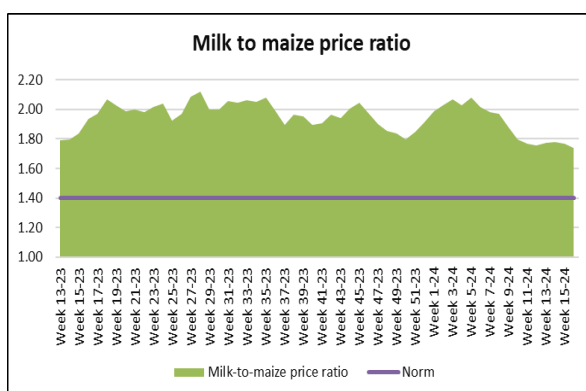
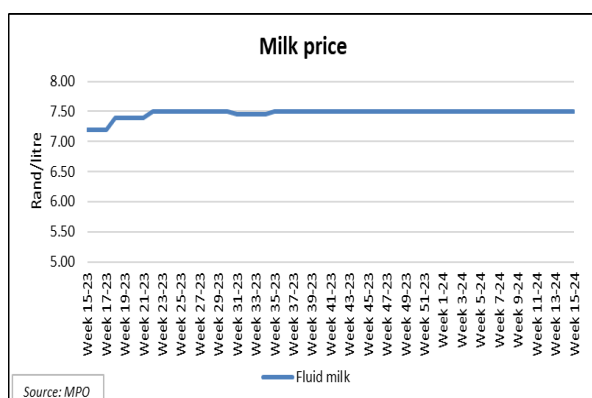
- The **beef prices** were largely bearish week-on-week (w/w).
- The average prices of class A2/A3 and AB2/AB3 decreased by 2.7% and 0.8% w/w to R56.49/kg and R52.63/kg, respectively.
- The average price of class B2/B3 decreased w/w by 0.5% to R48.44/kg, while class C2/C3 increased by 2.7% to R43.80/kg.
- On average, beef prices were 3.2% lower year-on-year (y/y) due to subdued consumer demand.
- The average **weaner price** increased by 3.1% w/w to R31.45/kg due to improved demand for weaners on the market.
- In the past week, the average **beef-to-maize price ratio** decreased by 1% to 13.1, as the average yellow maize price increased by 1.8% w/w.

The mutton and pork industries



- **Mutton and lamb prices** were bullish w/w.
- The average prices of class A2/A3 and AB2/AB3 increased w/w by 2.7% and 5.1% to R85.46/kg and R64.21/kg, respectively.
- The average prices of class B2/B3 and C2/C3 increased w/w by 5.6% and 9.5% to R55.56/kg and R57.40/kg, respectively.
- The average mutton and lamb prices were 4.4% lower y/y due to sluggish consumer demand.
- The **pork prices** were largely bearish w/w.
- The average price of porkers decreased by 2.8% w/w to R31.62/kg.
- The average price of baconers decreased w/w by 0.1% to R31.62/kg, while the average price of sausage increased w/w by 0.8% to R25.94/kg.
- On average, pork prices were 5.5% higher y/y.

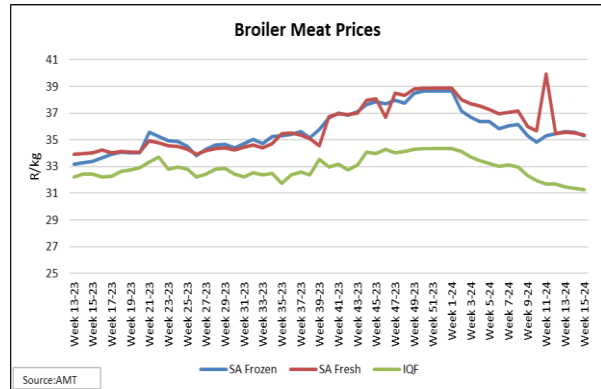
The dairy industry



- The latest average **milk producer price** set by dairy processors is estimated at R7.50/l.
- In the past week, the average **milk-to-maize price ratio** dropped by 1.7% w/w to 1.74.
- The decrease in the milk-to-maize price ratio was due to the 1.8% 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, a level which should continue to support the intensive dairy production industry.

The broiler industry

- **Broiler prices** were bearish w/w.
- Average prices of **South African frozen and fresh chicken** decreased w/w by 0.8% and 0.5% to R35.30/kg and R35.35/kg, respectively.
- The average price of **IQF** chicken also decreased by 0.4% w/w to R31.25/kg.
- Average chicken prices were up by 2% y/y.



The wool industry

Indicator	SA prices (R/kg)		Change
	Previous	Current	
Clean non-RWS certified wool	149.11	147.35	↓ -1.2%
Clean RWS certified wool	166.79	165.25	↓ -0.9%

- The latest **wool auction** took place on 10 April 2024, with 11 112 bales of wool on offer.
- There was good competition for the merino wools on offer, with 52.6% of the merino wools on offer being certified as sustainable.
- However, the market was restrained by a stronger local currency against major currencies.
- Approximately 92.5% 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** decreased by 1.2% and 0.9% to R147.35/kg and R165.25/kg, respectively.
- The next wool auction of 2024 is expected to take place on 24 April 2024.

Mohair industry

Commodity	Rand/kg			Change from previous	Change (y/y)
	Last year	Previous	Current		
Mohair					
Kids	611,05	670,61	671,30	↑ 0,1%	↑ 9,9%
Young goats	394,71	395,87	395,73	↓ -0,04%	↑ 0,3%
Adults:					
- Fine	353,57	363,09	359,85	↓ -0,9%	↑ 2,7%
- Strong	328,24	327,91	326,6	↓ -0,4%	↓ -0,1%

- The fourth **mohair sale** of the 2024 summer season took place on 16 April 2024, with 176 290kg of mohair on offer.
- The market was bearish compared to the previous sale.
- Approximately 96% of the mohair that was on offer was sold during the sale.
- About 92% of mohair that was offered during the sale was **RMS** (Responsible Mohair Standard) certified.
- The average prices of **kid** mohair increased by 0.1%, while **young goats** mohair decreased by 0.04%, compared to the previous sale. These average prices were 9.9% and 0.3% higher compared to the previous year, respectively.
- The average prices of **adult fine** and **adult strong** mohair decreased by 0.9% and 0.4% compared to the previous sale, respectively. These prices were 2.7% higher and 0.1% lower compared to the previous year, respectively.
- The third mohair sale of the 2024 summer season is expected to take place on 30 April 2024.

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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