

SOUTH AFRICAN POULTRY MEAT IMPORTS: COUNTRY REPORT FEBRUARY 2018

PLEASE NOTE:

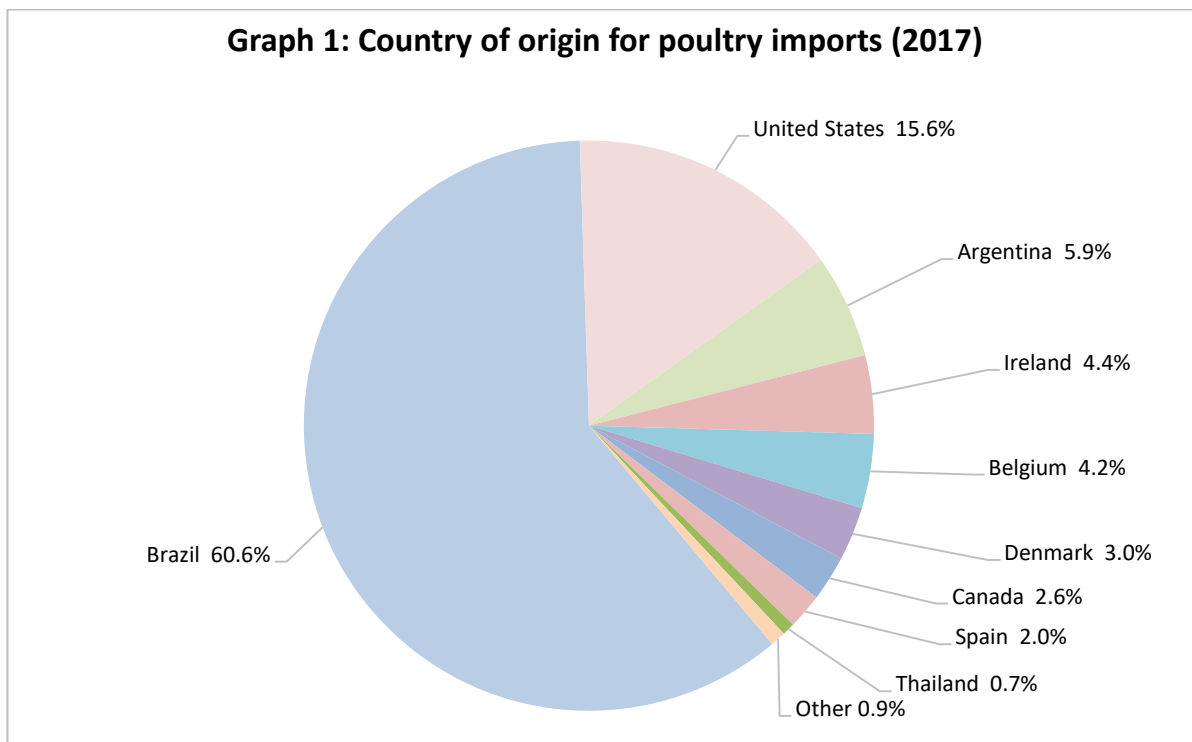
- This report is based on SARS verified stats. The verified stats will be corrected up to two years in arrears.
- Where the term 'poultry' is used, this may refer to imports of chicken, turkey, duck, goose or guinea fowl.

If, as a regular user of this report, you would like other data included or data presented in a different format (e.g. tables), please contact us on cynthia@silverpath.co.za with your suggestions.

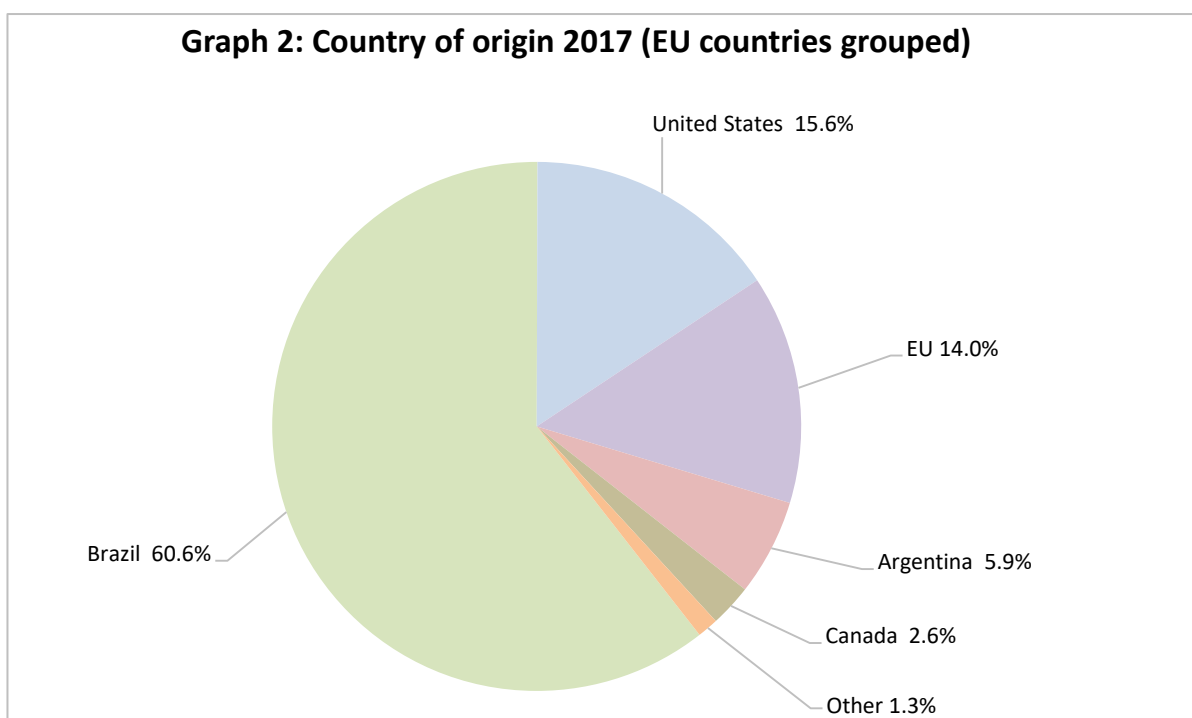
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1. IMPORTS FOR 2017

Poultry imports for 2017 totalled 556 877 t down 0.6 % on 2016 imports. Imports for 2017 are up 25 % over the 5-year average for poultry imports. The percentage contributions from the major importing countries are shown in Graph 1:



Brazil was the main country of origin in 2017, accounting for 60.6 %, or 337 476 t, of total poultry imports into South Africa. With AI affecting EU trade, the US was the second largest importer into the country, with 15.6 % or 87 059 t. Argentina and Canada increased exports to South Africa, in the absence of many of the EU nations, to account for 5.9 % (32 816 t) and 2.6 % (14 431 t) of 2017 imports, respectively. Of the EU exporters, only Ireland, Belgium, Denmark and Spain exported significant quantities to South Africa in 2017: 24 746 t (4.4 %), 23 451 t (4.2 %), 16 884 t (3.0 %) and 11 138 t (2.0 %), respectively. Thailand exported 4 109 t to South Africa in 2017 (0.7 % of total imports). All other importing countries contributed only 0.9 % to imports of poultry into South Africa in 2017. If the EU countries are considered as a single entity, 14.0 % of poultry imports entered SA through the EU in 2017, compared to 48.1 % in 2016 and 47.1 % in 2015. This drop in 2017 reflects the impact of the trade bans on EU countries affected by avian influenza. In Graph 2, the EU countries are grouped together as a single entity.

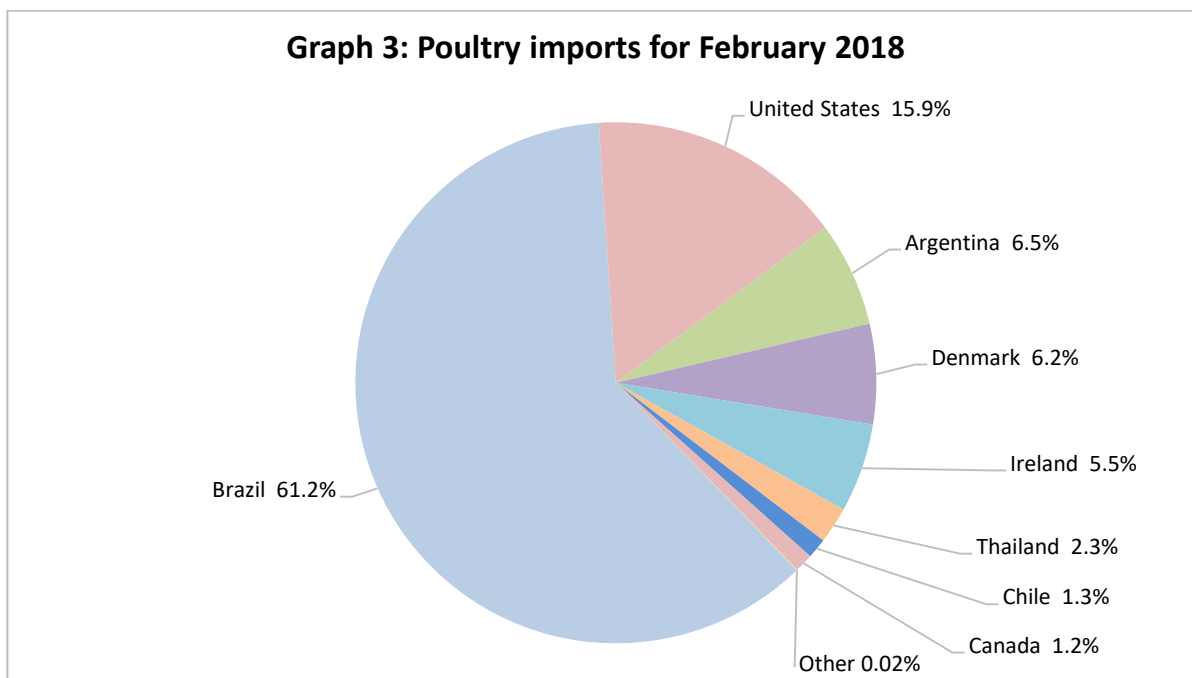


2. MONTHLY IMPORTS FOR FEBRUARY 2018

Poultry imports into South Africa totalled 40 230 tonnes in February 2018. Since December 2016, Brazil has been the main country of origin for South African poultry imports, with the exception of March 2017 when the States landed over 25 000 t of poultry products here. In February 2018, Brazil accounted for 61.2 % or 24 610 t of total imports (Graph 3); *cf* just 37.9 % of total imports in March 2017.

Under the terms of the AGOA agreement, US imports of frozen bone in portions resumed in January 2016. The US may export 65 000 tonnes of bone-in frozen chicken per annum, free from anti-dumping duties (cycle April to March). The US holds on to second place on the imports table in February, with 6 396 tonnes (15.9 % of imports). Argentina was the third biggest importer of poultry products into South Africa in February (2 616 tonnes; 6.5 %).

Avian influenza reduced Dutch, French, German, Polish, Hungarian and UK imports to almost zero for most of 2017. Spain and Belgium are also not exporting to South Africa at the moment. Denmark and Ireland continue to export and were responsible for 6.2 % and 5.5 % of the total imports in February, respectively. Thailand, Chile and Canada accounted for 2.3 %, 1.3 % and 1.2 %, respectively (see graph below). Other countries (France, and Germany) contributed 0.02 % collectively. Most European HPAI events are now considered resolved (OIE) although the UK, the Netherlands, Germany, Denmark and Ireland have all reported cases in wild birds in recent months (see below under each country). The Netherlands and Germany have reported H5N6 in commercial and backyard poultry in 2018.



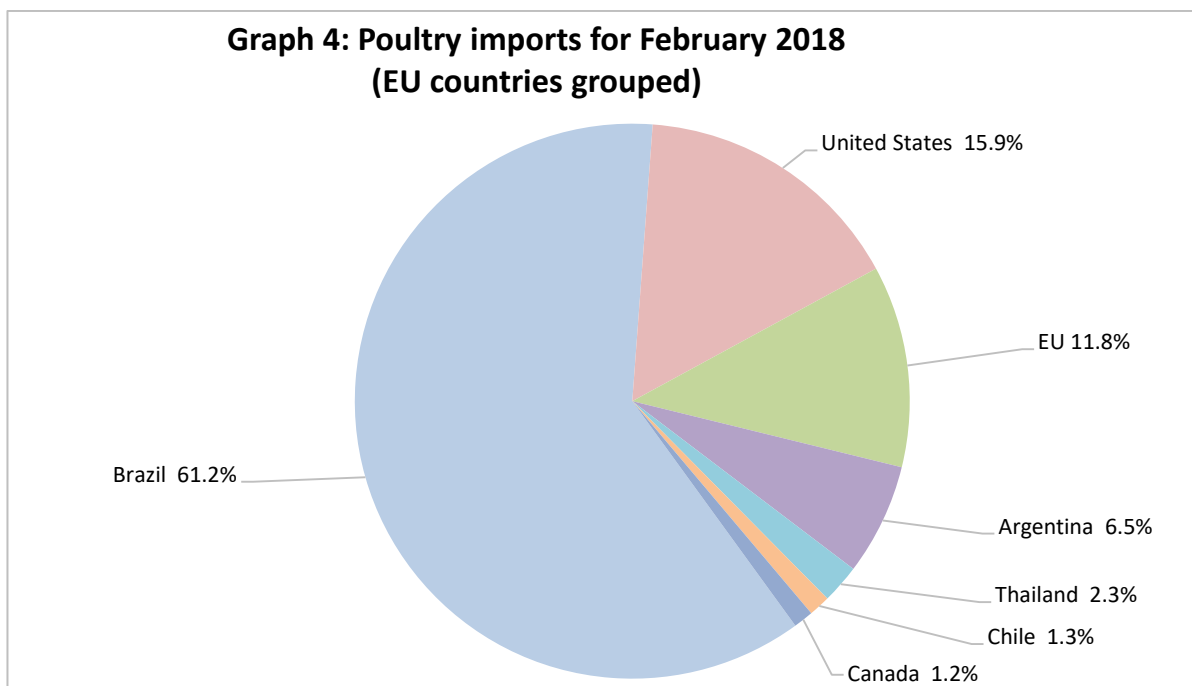
Only 265 *kilogrammes* of poultry product arrived from France in February 2018, because of AI-related restrictions on trade. Germany exported 8.8 *tonnes* of poultry product to South Africa in February. Chile landed 503 *tonnes* of mostly frozen turkey cuts/offal and frozen chicken offal.

The Canadians exported 465 t of poultry products to South Africa in February 2018. The Thais exported 910 tonnes.

Poland entered the South African market in August 2016, with 82 t of chicken drumsticks and chicken offal. Polish volumes increased to 2 521 t in November 2016 but the country has experienced outbreaks of HPAI since late 2016 and no poultry imports were received from Poland through 2017 or in 2018 YTD.

Graph 4 shows the origin of poultry imports in February 2018, with the EU countries grouped together as a single entity.

Imports from the EU contributed 11.8 % (4 730 t) of total poultry imports into South Africa in February (*cf* 63.1 % in December 2016). EU tonnages were down 8.6 % on a monthly basis and are down 49.1 % on a year-on-year basis.

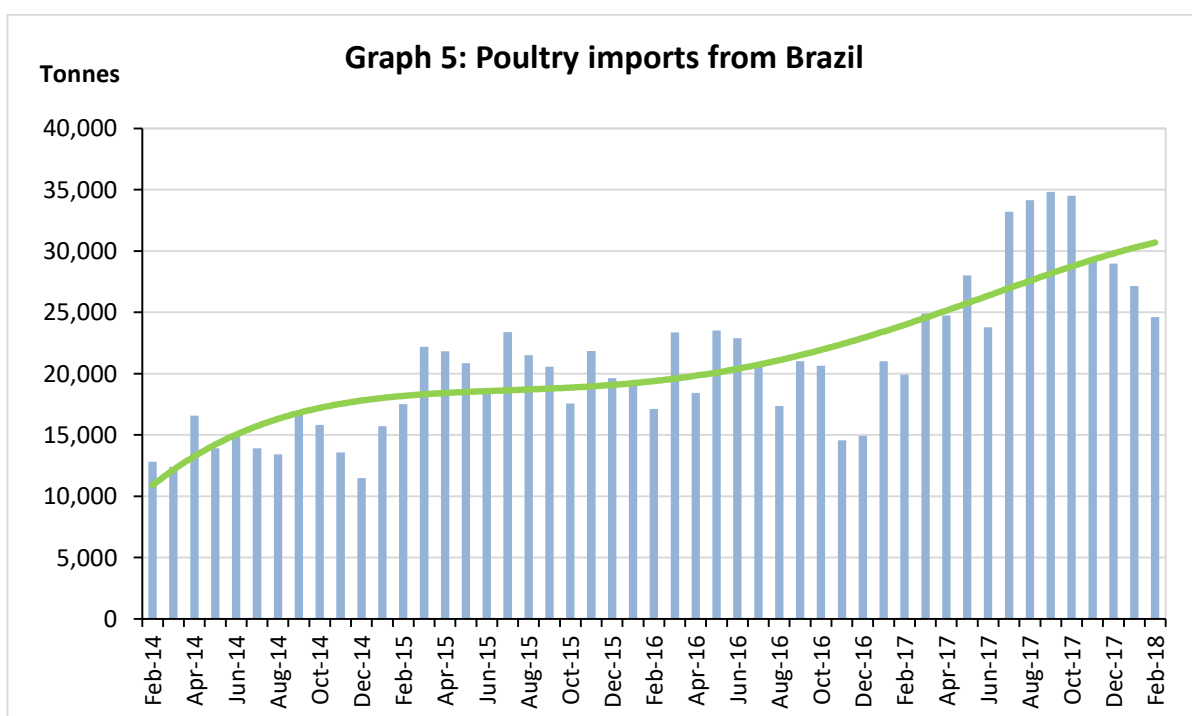


COUNTRIES OF ORIGIN

3.1 Poultry imports from Brazil

Poultry imports from Brazil totalled 24 610 t in February 2018, representing 61.2 % of total poultry imports in volume terms, with an FOB import value of R237.2 million. On a monthly basis, imports from Brazil decreased by 9.4 % (- 2 546 t). Imports increased by 23.5 % (+ 4 683 t) compared to February 2017, illustrating how Brazil's imports to South Africa have rocketed since AI-related trade bans were put in place against EU countries.

Graph 5 shows the monthly imports (t) from Brazil, since February 2014:

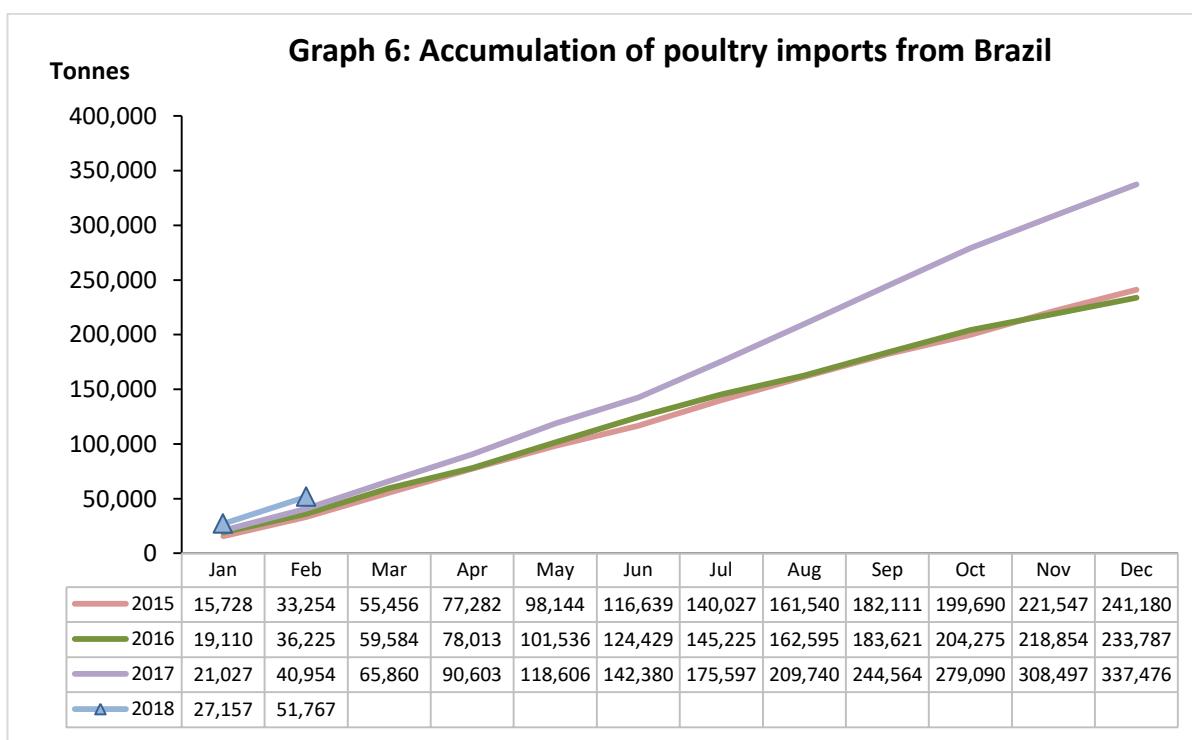


Brazilian imports in February 2018 included 37.8 % mechanically deboned meat; 7.5 % chicken offal and carcasses; 37.7 % frozen chicken bone-in leg quarters; 4.7 % frozen chicken drumsticks; 4.0 % other frozen chicken portions (wings, thighs, other); 5.1 % frozen boneless chicken portions and 2.7 % turkey meat. Imports included a small quantity of value-added chicken and whole frozen chickens. In December 2016, Brazilian imports comprised just 2.9 % bone-in chicken portions. In February 2018, this figure has increased to 46.5 %.

Accumulated imports in December 2017 (337 476 t) were 44.4 % higher than in December 2016 (Graph 6). Accumulated Brazilian imports (51 767 t) in 2018 YTD are 26.4 % higher than in the same period in 2017.

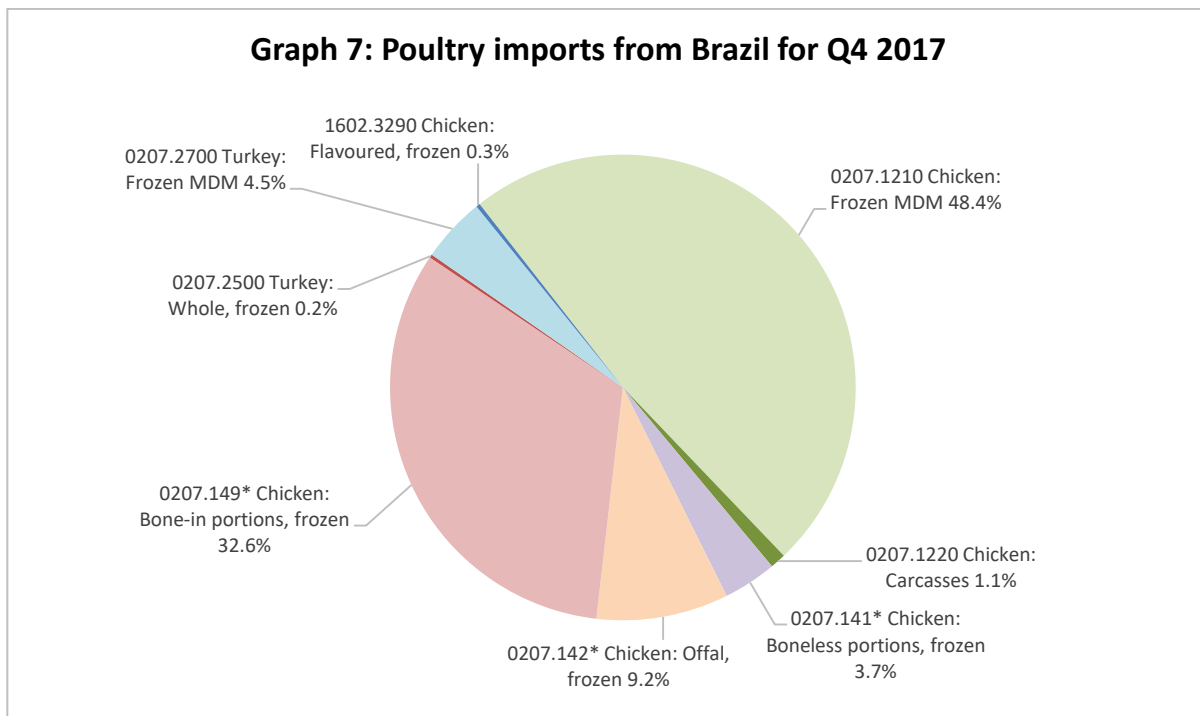
Poultry imports from Brazil for February 2018:

Tariff	Description	Import Quantity in kg	FOB Import Price in R	Unit Price in R per kg
0207.1210	Chicken: Not cut in pieces, Frozen Mechanically Deboned Meat	9,310,379	R 38,575,907	R 4.14
0207.1220	Carcasses (excluding necks and offal) with all cuts (e.g. thighs, wings, legs and breasts) removed	177,200	R 277,777	R 1.57
0207.1290	Chicken: Not cut in pieces, frozen, whole and half chickens	54,000	R 1,010,484	R 18.71
0207.1300	Chicken: Cuts and offal, fresh or chilled	25,998	R 69,090	R 2.66
0207.1411	Chicken: Boneless cuts: Breasts	930,244	R 22,527,086	R 24.22
0207.1415	Chicken: Boneless cuts: Other	325,095	R 6,628,722	R 20.39
0207.1421	Chicken: Offal: Livers	421,901	R 2,836,062	R 6.72
0207.1423	Chicken: Offal: Feet	211,518	R 2,551,328	R 12.06
0207.1429	Chicken: Offal: Other	1,028,165	R 3,004,618	R 2.92
0207.1493	Chicken: Other: Leg quarters	9,271,940	R 115,973,488	R 12.51
0207.1495	Chicken: Other: Wings	389,760	R 7,293,072	R 18.71
0207.1498	Chicken: Other: Drumsticks	1,165,840	R 16,000,617	R 13.72
0207.1499	Chicken: Other: Other	604,698	R 9,437,524	R 15.61
0207.2700	Turkey: Cuts and offal, frozen; Frozen Turkey portions and MRM	675,625	R 10,647,685	R 15.76
1602.3290	Chicken: Flavoured, herbed or marinated	18,000	R 347,540	R 19.31
Total for:	Brazil in February 2018	24,610,363	R 237,181,000	R 9.64

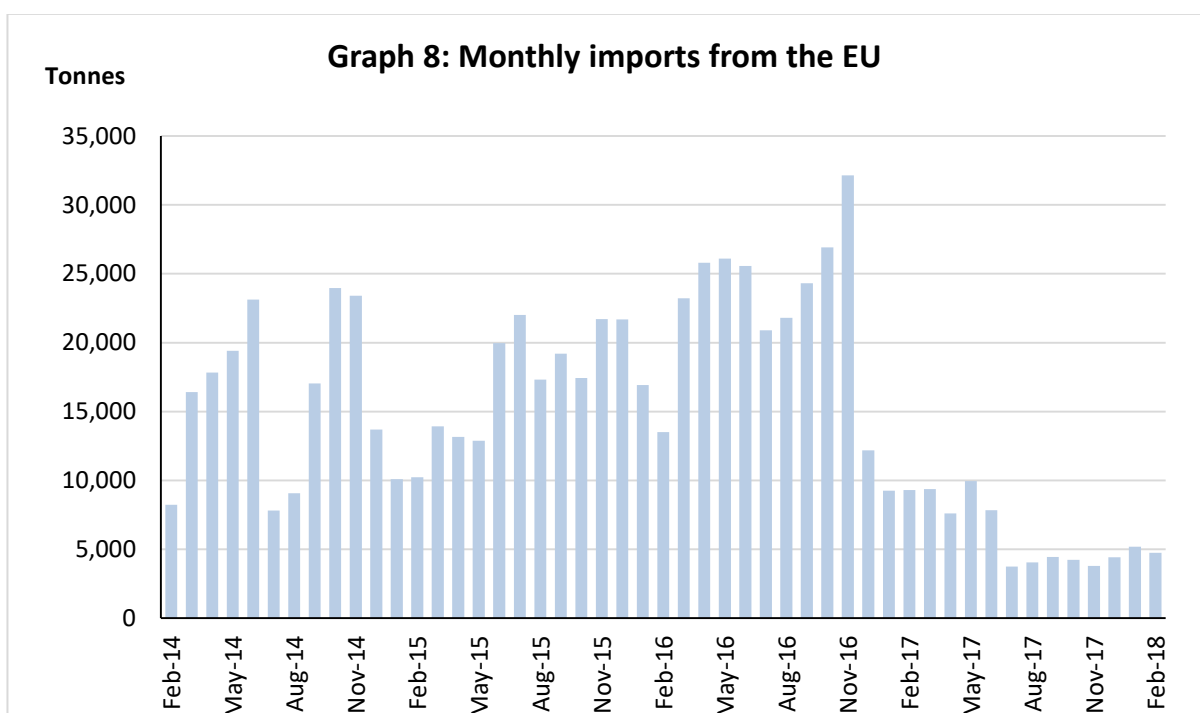


Quarterly poultry imports from Brazil:

Mechanically deboned meat (0207.1210) made up 48.4 % (44 975 t) of all imports originating from Brazil during the 4Q 2017 (total: 92 912 t). During the fourth quarter of 2017, the remainder of Brazilian imports included 9.2 % frozen offal (0207.142*); 32.6 % bone-in chicken portions (0207.149*); 4.5 % frozen turkey portions and MDM (0207.2700); 3.7 % frozen boneless chicken portions (0207.141*); 1.1 % frozen chicken carcasses and 0.3 % value-added chicken (1602.3290; Graph 7).

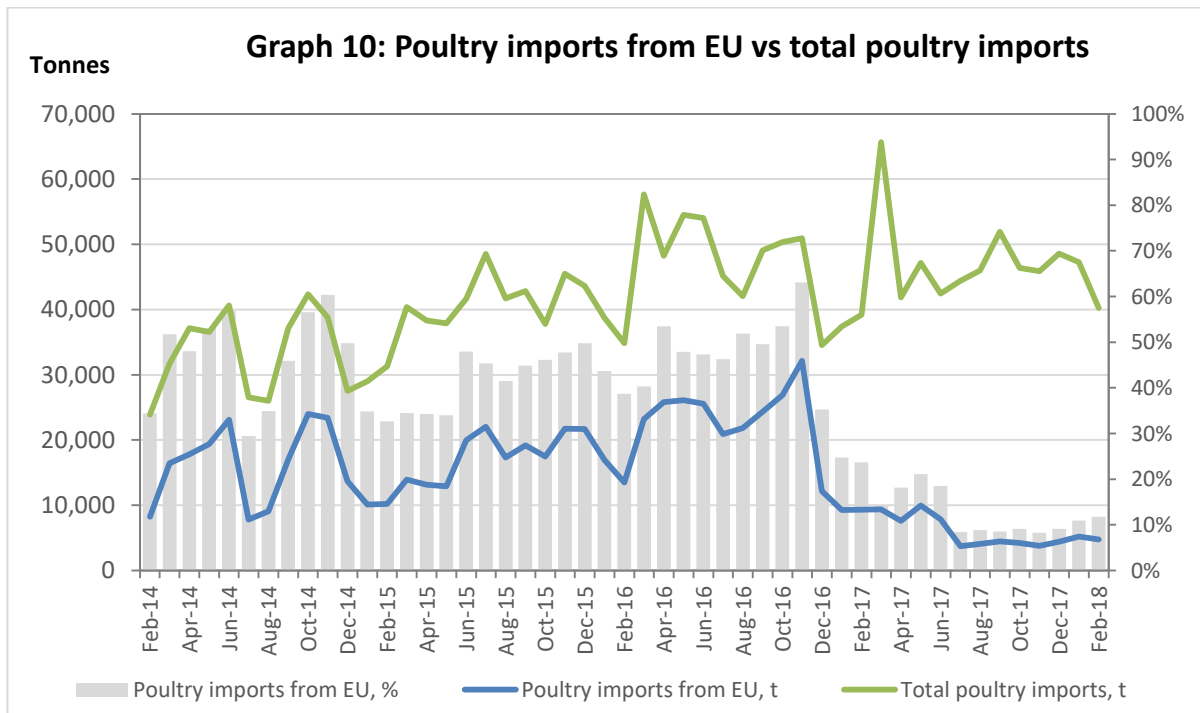
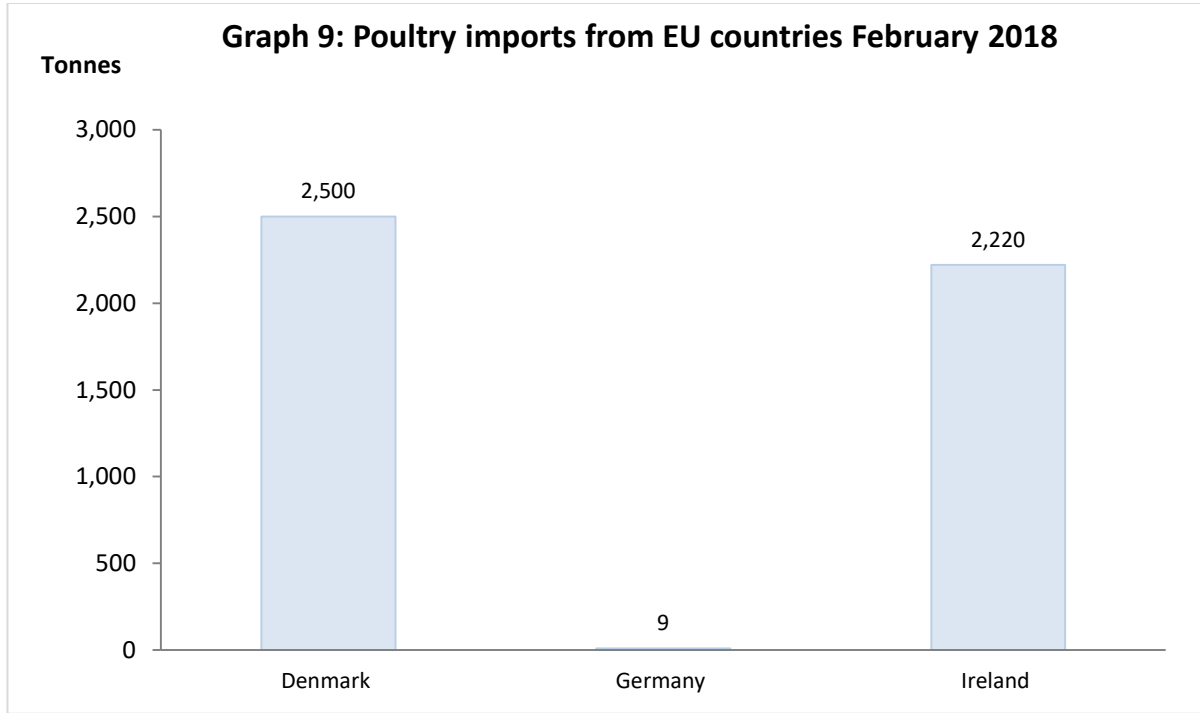


3.2 Poultry imports from the EU



Graph 8 (above) depicts the total monthly poultry imports from the European Union from February 2014 to February 2018. During February 2018, 4 730 t of poultry imports entered the country from the EU; this is 8.6 % less than in January (- 445 t).

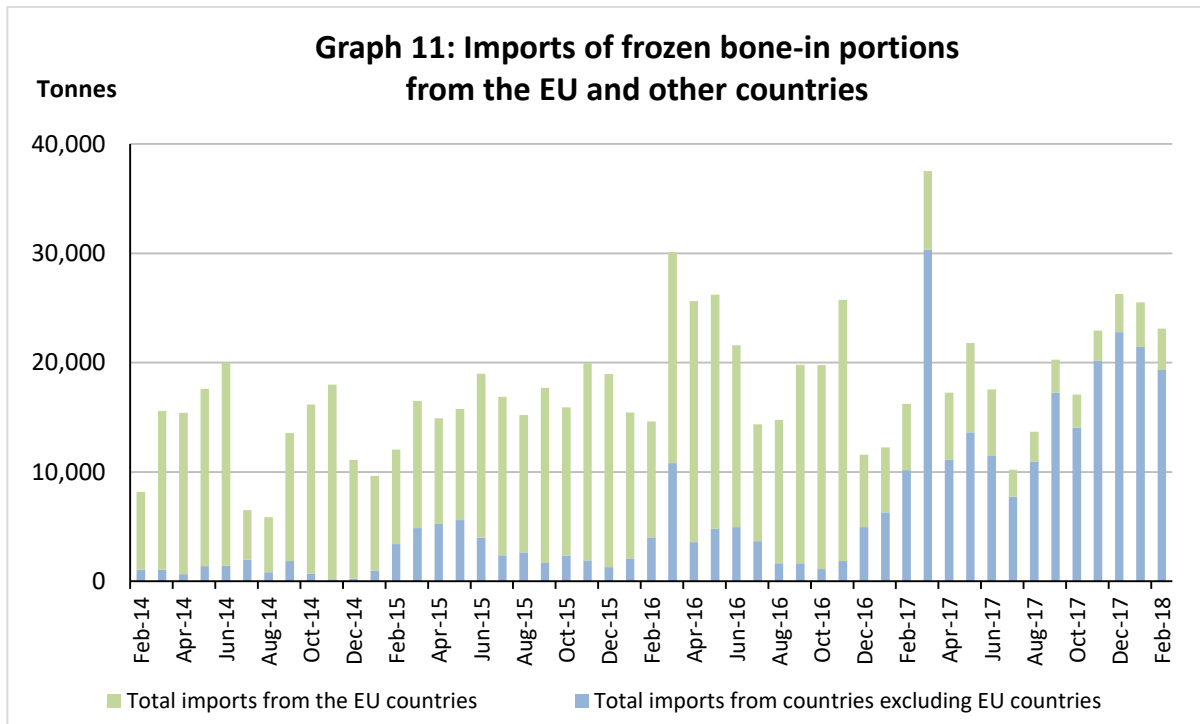
EU imports represent 11.8 % of total poultry imports in February. Imports from individual EU countries, with notable tonnages, are shown in Graph 9. Only three EU nations sent product in excess of 1 tonne to South Africa in February, because of AI-related trade bans.



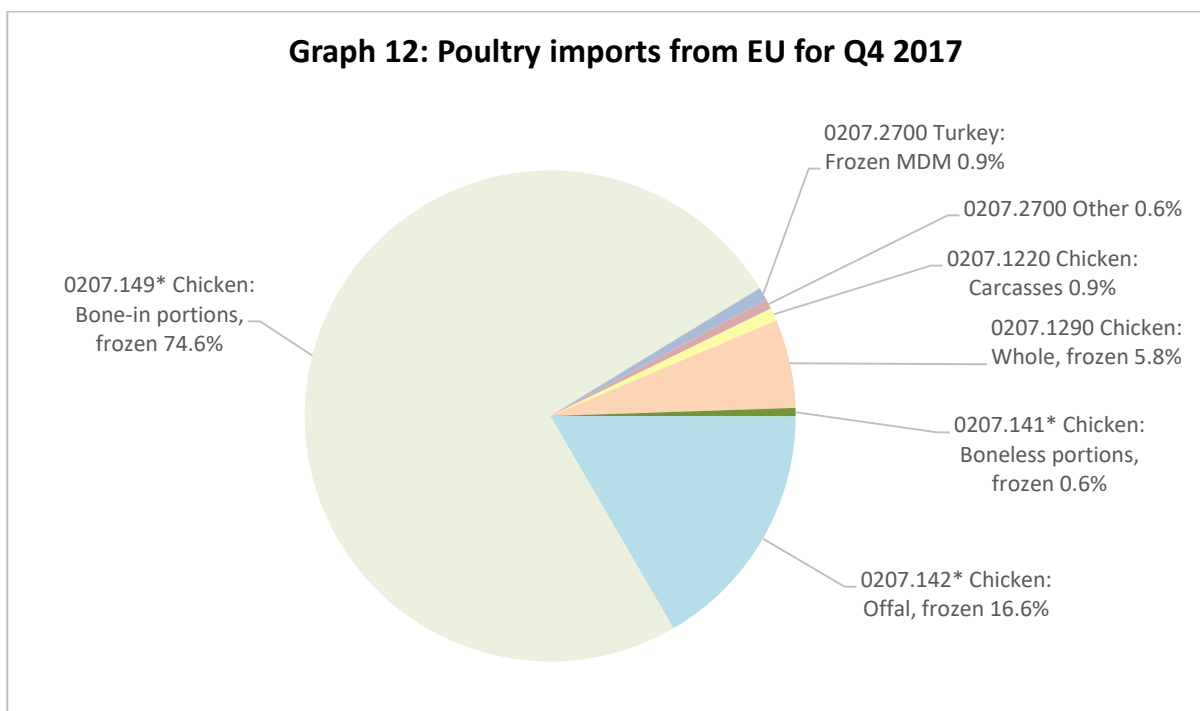
The contribution of the EU to total poultry imports reached 60 % in November 2014 (Graph 10) before the HPAI outbreaks of 2015. EU tonnages rose strongly again through 2016 as the bloc recovered from the epidemic, hitting 63 % of total imports in November 2016. Imports dropped

dramatically from December 2016 in response to new AI-related trade bans. February 2018 imports from the EU are down 49.1 % (- 4 567 t) on February 2017 imports and down 85 % on the record EU imports received in November 2016.

The contribution of frozen bone-in portions imports originating from the EU had been increasing steadily, relative to imports from other countries (Graph 11) but, with AI-related trade bans applied since November 2016, the EU proportion has decreased from > 60 % to < 12 %.



Quarterly poultry imports from EU:

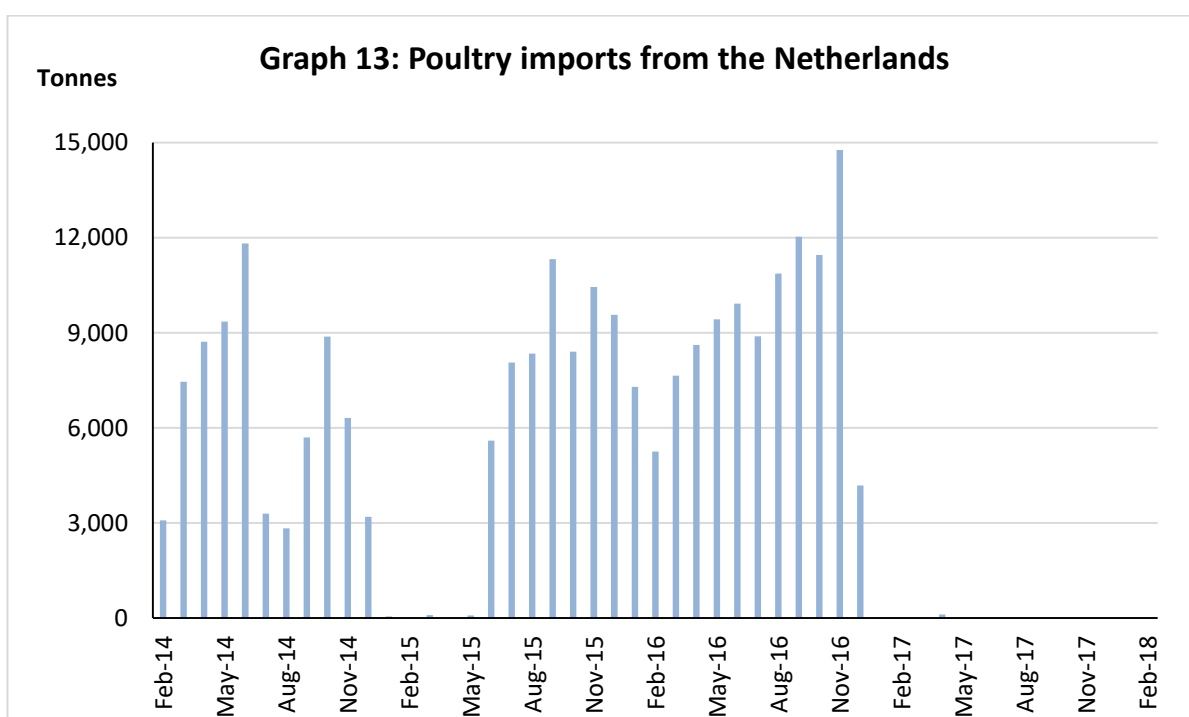


Frozen bone-in chicken portions (0207.149*) made up 74.6 % (9 269 t) of all imports originating from the EU during the 4Q 2017 (total: 12 417 t; Graph 12 above).

During the third quarter of 2017, the remainder of EU imports comprised 16.6 % frozen offal (0207.142*); 5.8 % whole frozen chickens (0207.1290); 0.9 % frozen chicken carcasses (0207.1220); 0.6 % frozen boneless chicken portions (0207.141*) and 0.6 % of products imported on other tariff lines.

3.2.1 Poultry imports from Netherlands for February 2018:

Dutch poultry imports reached a peak in November 2016 (14 769 t; see Graph 13). However, from November 2016, the Netherlands reported two H5N8 HPAI events to the OIE. The first event totalled 56 outbreaks (351 cases) with the last outbreak reported on 22 March 2017. The second event centred on nine farms, totalling 3 658 cases. Over 210 000 birds were culled. Final reports on both these events were submitted to the OIE on 17 May 2017 and the Dutch officially declared their avian-influenza free-status regained, under the terms of Article 10.4.3 of the OIE Terrestrial Animal Health Code (2016). On 22 May 2017, the Netherlands reported two cases of H5N5 HPAI in wild greylag geese in the Utrecht region of the country. From 9 December 2017, a new event has been opened with the OIE by the Dutch. Mute swans in the Gelderland region were found to be infected with an H5N6 subtype of the AI virus. This is thought to be a re-assortment linked to H5N8, and not related to the Asian H5N6 strain. In follow-up reports (24 January and 23 March 2018), further cases in swans, mallard ducks, gulls, greylag geese, Indian peafowl, buzzards and falcons have been reported from Gelderland, Flevoland, Zuid-Holland, Noord-Holland, Zeeland and Groningen. Cases since December now total 68, in 10 outbreaks. The latest reported case in wild birds was on 28 February 2018. A final report on this event was submitted to the OIE on 5 April 2018.

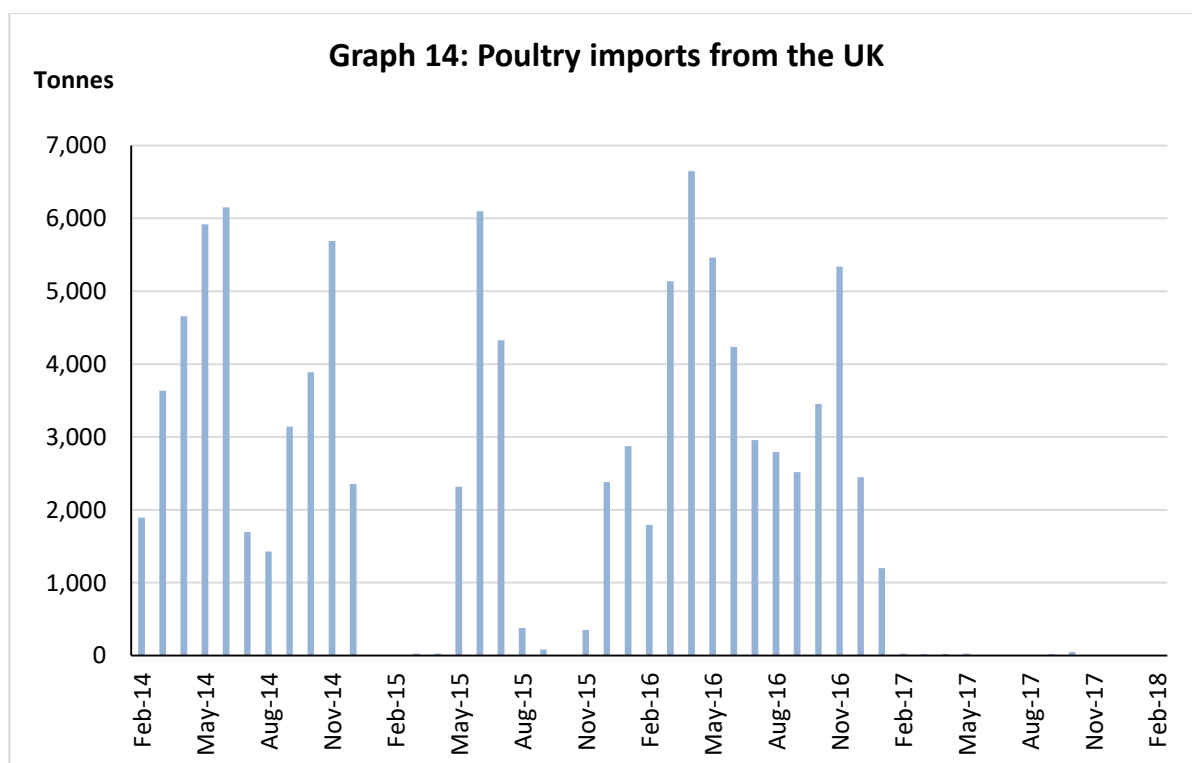


In December 2017, the Dutch reported an outbreak of H5N6 HPAI in a duck farm to the east of Amsterdam (Flevoland). This outbreak resulted in the culling of 16 000 fattening ducks. A final report on this event, declaring it resolved, was submitted to the OIE on 5 April 2018. On 24 February, the Dutch reported H5N6 HPAI in a farm in the province of Groningen in the north of the country. Almost 38 000 birds have been culled, after 230 died from the disease. A second outbreak was added to this event on 12 March in the Overijssel region. In this outbreak, almost 29 000 birds have been culled.

No poultry products were imported from the Netherlands in February 2018. Poultry imports from the Netherlands totalled 110 344 t in 2016, an increase of 48 349 t (+ 78 %) in comparison with 2015 (61 995 t). Dutch imports in 2017 totalled 122 tonnes.

3.2.2 Poultry imports from the UK for February 2018:

In February 2018, no poultry products were received from the UK (Graph 14).



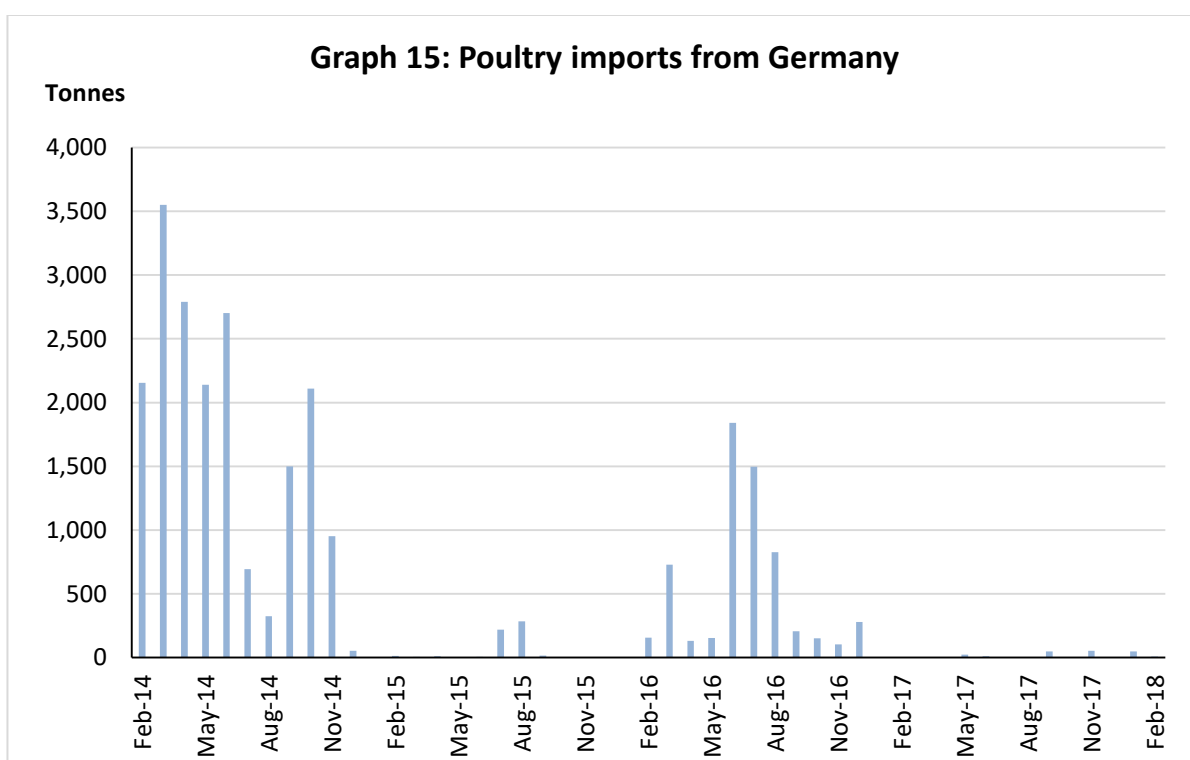
Poultry imports from the UK totalled 45 657 t in 2016, an increase of 186 % over 2015 levels (15 985 t). In 2017, imports from the UK amounted to 1 366 tonnes.

Since 11 December 2016, the UK has been dealing with regular outbreaks of H5N8 HPAI. To March 2017, the UK reported 27 outbreaks, consisting of 5 880 cases in commercial birds and 178 in wild birds. A final report was submitted on this event to the OIE on 9 March 2017. However, a separate report was submitted on 3 March 2017 confirming H5N8 HPAI in a wild European wigeon in Pembrokeshire in Wales. On 3 May 2017, the UK experienced a new outbreak of H5N8 in a backyard flock in the Wyre district of Lancashire and, within days, a second outbreak was reported nearby. All susceptible birds were destroyed. In early June, H5N8 HPAI was recorded in a backyard flock in Diss, Norfolk.

In late July 2017, the UK reported H5N8 in a mute swan on the Norfolk Broads. Final reports on these latest events were issued to the OIE on 13 September 2017. From 9 January 2018, the UK has reported 20 outbreaks, totalling 85 cases in wild birds (mostly mute swans) across Dorset, Rutland, Hertfordshire, Greater London, Warwickshire, Surrey, Berkshire, Oxfordshire, South Glamorgan, Northern Ireland, Lincolnshire, Hampshire, Suffolk and Devon. The species affected by the H5N6 strain include mute swans, gulls, geese, ducks, moorhens, grebes, pheasants, Eurasian buzzards and goshawks. The national risk remains “medium” for wild birds (DEFRA) but an avian influenza prevention zone has been extended to cover the whole of England and Wales, legally obliging poultry owners to follow strict biosecurity practices.

3.2.3 Poultry imports from Germany for February 2018:

Low and erratic levels of imports have been recorded from Germany over the last three years as a result of temporary bans on imports because of avian influenza in the 4Q 2014, 3Q 2015, 4Q 2016 and 1H 2017. To 26 May 2017, Germany notified the OIE of 286 outbreaks of H5N8 HPAI in wild birds and commercial poultry; with the last confirmed outbreak on 9 May. More than 1.15 million birds have been destroyed as part of control measures. Germany also reported three outbreaks (2 350 cases) of H5N5 HPAI in breeding and fattening turkeys in January 2017. Over 1 950 birds died and a further 30 750 were destroyed. Final reports on all these outbreaks were submitted to the OIE on 11 August 2017. However, on 29 August a new notification was made by the Germans to the OIE, reporting H5N8 HPAI in three wild swans in Sachsen-Anhalt in the centre of the country. A final report on this event was issued on 4 October 2017. On 18 October, the Germans reported H5N8 in a wild mallard duck in the north-west region of Nieder-Sachsen, on the Dutch border. This event was declared resolved (23 October 2017). On 4 January 2018, the Germans reported a single case of H5N6 HPAI in a wild duck near Bayern. A final report was submitted to the OIE on 2 February 2018. On 20 March 2018, the Germans reported H5N6 in a backyard flock of rare and endangered fowl, in the northerly Schleswig-Holstein region.



In February 2018, 8.8 tonnes of poultry imports were received from Germany (Graph 15) at an FOB value of R0.55 million; down 35.1 tonnes on January's imports. German imports consisted solely of value-added chicken products. Germany accounted for only 0.02 % of total poultry imports into South Africa in February 2018.

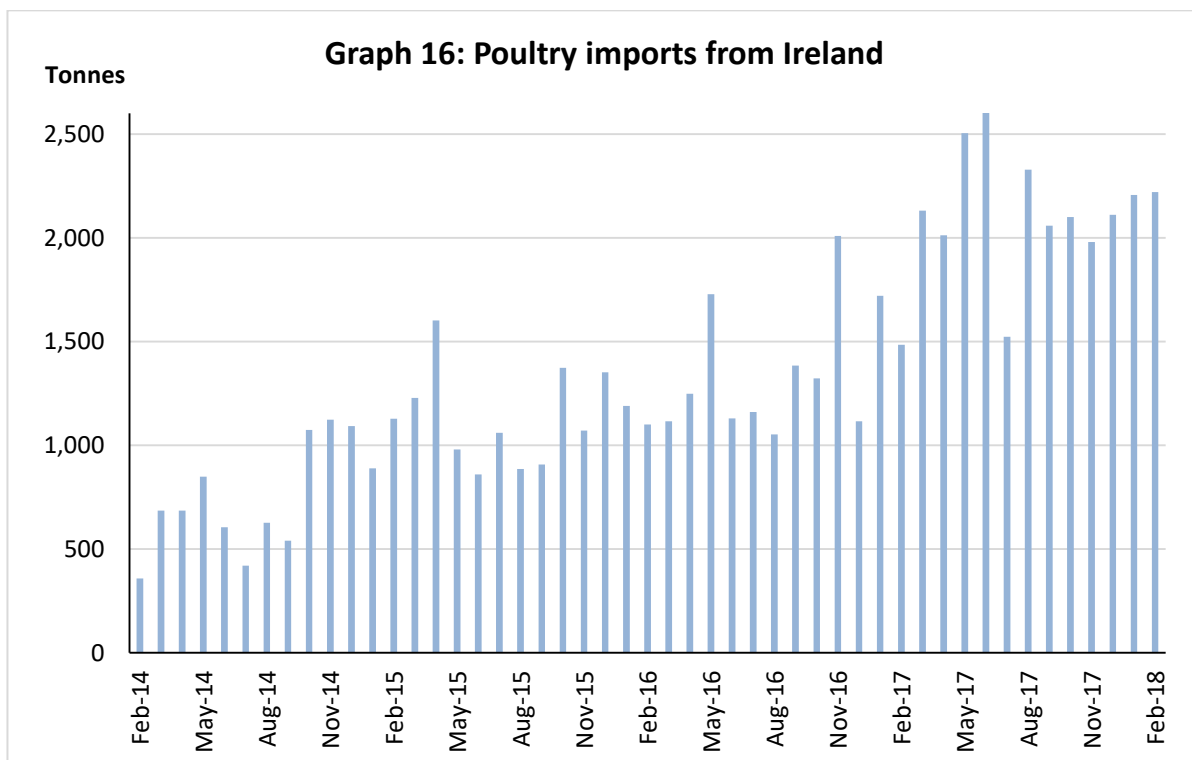
Poultry imports from Germany for February 2018:

Tariff	Description	Import Quantity in kg	FOB Import Price in R	Unit Price in R per kg
1602.3290	Chicken: Flavoured, herbed or marinated	8,767	R 545,362	R 62.21
Total for:	Germany in February 2018	8,767	R 545,362	R 62.21

Poultry imports from Germany were restricted to 554 t in 2015. In 2016, 6 073 t of poultry products were imported from Germany. In 2017, only 134 t of German poultry products were imported.

3.2.4 Poultry imports from Ireland for February 2018:

In February 2018, 2 220 t of poultry meat were imported from Ireland at an FOB value of R 35.1 m (Graph 16). Irish imports accounted for 5.5 % of total imports into South Africa in February; an increase of 0.6 % (+ 13.6 t) on a monthly basis and an increase of 49.6 % (+ 737 t) on February 2017 imports.



Of the Irish imports, 40.1 % were chicken leg quarters; 22.7 % chicken offal (livers, feet and other); 7.9 % frozen turkey cuts and offal; 5.3 % whole frozen chicken; 2.3 % frozen chicken carcasses and 21.6 % other bone-in portions (wings, thighs, drumsticks and other).

Poultry imports from Ireland for February 2018:

<i>Tariff</i>	<i>Description</i>	<i>Import Quantity in kg</i>	<i>FOB Import Price in R</i>	<i>Unit Price in R per kg</i>
0207.1220	Carcasses (excluding necks and offal) with all cuts (e.g. thighs, wings, legs and breasts) removed	50,500	R 636,375	R 12.60
0207.1290	Chicken: Not cut in pieces, frozen, whole and half chickens	117,500	R 1,993,385	R 16.96
0207.1421	Chicken: Offal: Livers	75,000	R 823,736	R 10.98
0207.1423	Chicken: Offal: Feet	176,400	R 2,190,132	R 12.42
0207.1429	Chicken: Offal: Other	251,600	R 1,846,218	R 7.34
0207.1493	Chicken: Other: Leg quarters	890,305	R 16,733,928	R 18.80
0207.1495	Chicken: Other: Wings	189,800	R 3,063,629	R 16.14
0207.1497	Chicken: Other: Thighs	164,400	R 3,256,158	R 19.81
0207.1498	Chicken: Other: Drumsticks	75,220	R 1,555,744	R 20.68
0207.1499	Chicken: Other: Other	51,091	R 567,690	R 11.11
0207.2700	Turkey: Cuts and offal, frozen; Frozen Turkey portions and MRM	176,085	R 2,394,166	R 13.60
1602.3290	Chicken: Flavoured, herbed or marinated	2,520	R 28,280	R 11.22
Total for:	Ireland in February 2018	2,220,421	R 35,089,441	R 15.80

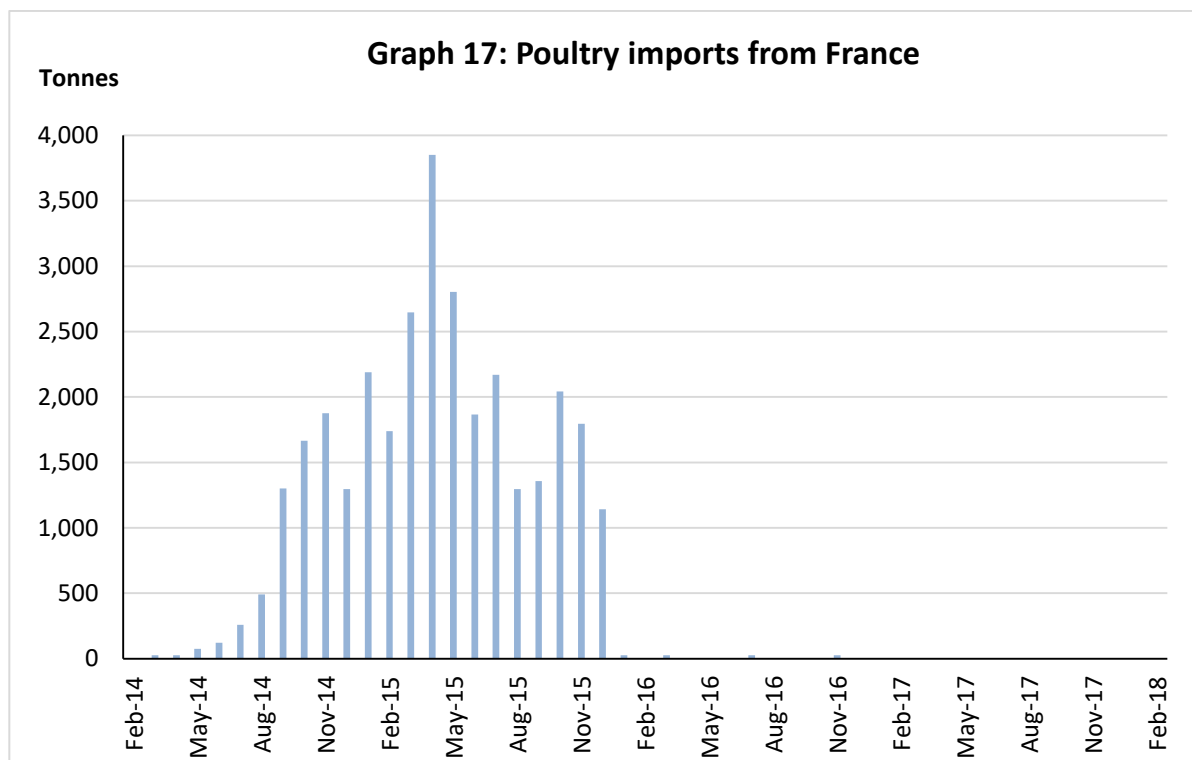
In 2017, Ireland exported 24 746 t of poultry products to South Africa, compared to 15 556 t during 2016; an increase of 59.1 %. Accumulated Irish imports in 2018 YTD (4 427 t) are 38.2 % higher than the same period in 2017.

From 28 December 2017, the Irish have reported 9 outbreaks (12 cases) of H5N8 HPAI in whooping and mute swans, European wigeons and grey herons in counties Tipperary, Galway, Wexford, Roscommon, Leitrim and Cork. This event was declared resolved in a final report on 2 February 2018. On 9 February, in a separate event, the Irish reported a case of highly pathogenic avian influenza in a white-tailed eagle found in County Tipperary in the centre of the country. Two more cases have been added to this event – a Eurasian buzzard in County Tipperary (February) and a white-tailed eagle in County Clare (March).

3.2.5 Poultry imports from France for February 2018:

In February 2018, only 265 *kilogrammes* of poultry meat were imported from France at an FOB value of R88 479. These imports were pâté de foie gras and other products from ducks, geese or guinea fowl (total quantity too small to be visible in graph below). France accounted for 0.001 % of total poultry imports in February 2018.

Between December 2015 and August 2016, 81 separate outbreaks of the Eurasian H5N1, H5N2 and H5N9 strains (three events) were reported in the south west of France, resulting in the destruction of over 280 000 birds. The French were due to regain HPAI-free status in December 2016 but, on 17 November 2016, a fourth HPAI event was reported to the OIE. This event expanded to 55 outbreaks in all four corners of the country, with the last positive case being reported on March 10. This event was declared closed through the OIE on 18 October 2017. In a fifth event, beginning November 2016, the French had to report a further 485 outbreaks of H5N8 HPAI, totalling 15 900 cases, which resulted in the culling of over 1.29 million birds (OIE) in the districts of Landes, Hautes-Pyrenees, Gers, Deux-Sevres, Pyrenees-Atlantiq, Lot-et-Garonne, Aveyron and Tarn. The last positive outbreak was reported was on 26 June 2017. Local producers estimate that some 3.2 million birds were lost to the disease or in the pre-emptive culls. This event was also declared resolved with the OIE on the 18 October 2017.



Poultry imports from France for February 2018:

Tariff	Description	Import Quantity in kg	FOB Import Price in R	Unit Price in R per kg
1602.2010	Pate de foie gras, goose liver paste	261	R 86,134	R 330.02
1602.3990	Ducks, geese or guinea fowl: Other, Not including pastes	4	R 2,345	R 586.25
Total for:	France in February 2018	265	R 88,479	R 333.88

In 2016, France exported only 105.4 t of poultry products to South Africa, compared to 24 985 t during 2015; a decrease of 99.6 %. Accumulated imports into France in 2017 totalled 3.9 tonnes.

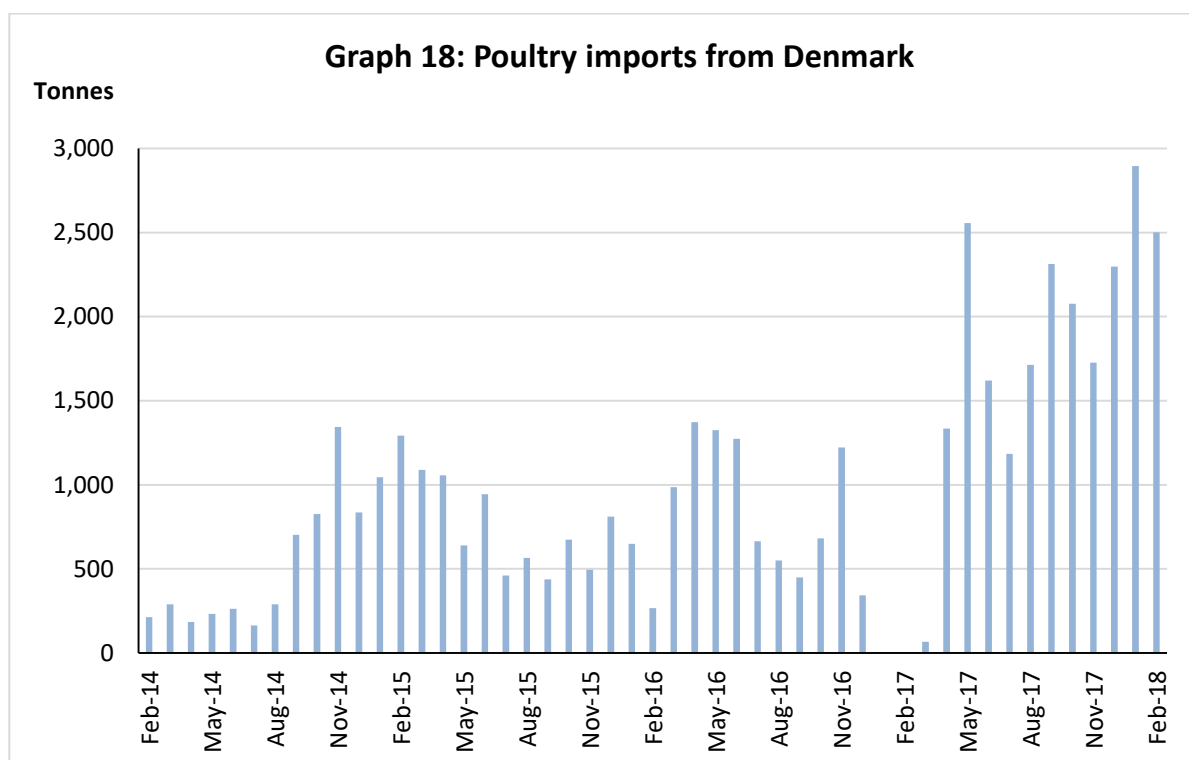
3.2.6 Poultry imports from Denmark for February 2018:

After reporting 36 outbreaks of H5N8 HPAI in wild birds (November 2016), Denmark reclaimed its HPAI-free status on 22 February 2017. In April 2017, Denmark reported H5N8 in a white-tailed eagle, but invoked Article 10.4.1.8 of the OIE Terrestrial Animal Health Code, which states that member states should not impose bans on poultry or poultry commodities in response to notification of the presence of HPAI in birds other than poultry. They have recently reported a further five outbreaks in white-tailed eagles, beginning 13 February 2018.

The Danes returned to the South African poultry market in March 2017. In February 2018, 2 500 t of poultry meat were imported from Denmark at a FOB value of R47.8 million. This is 396 t less (-13.7 %) than the tonnes imported in January. No poultry products were imported from Denmark a year ago in February 2017 (because of an AI-related trade ban in effect).

Denmark accounted for 6.2 % of total poultry imports in February 2018.

Of the Danish imports in December, 51.5 % were chicken leg quarters; 45.6 % other bone-in portions (wings, thighs, drumsticks and other); 2.1 % chicken offal (livers and other) and 0.8 % whole, frozen chickens.



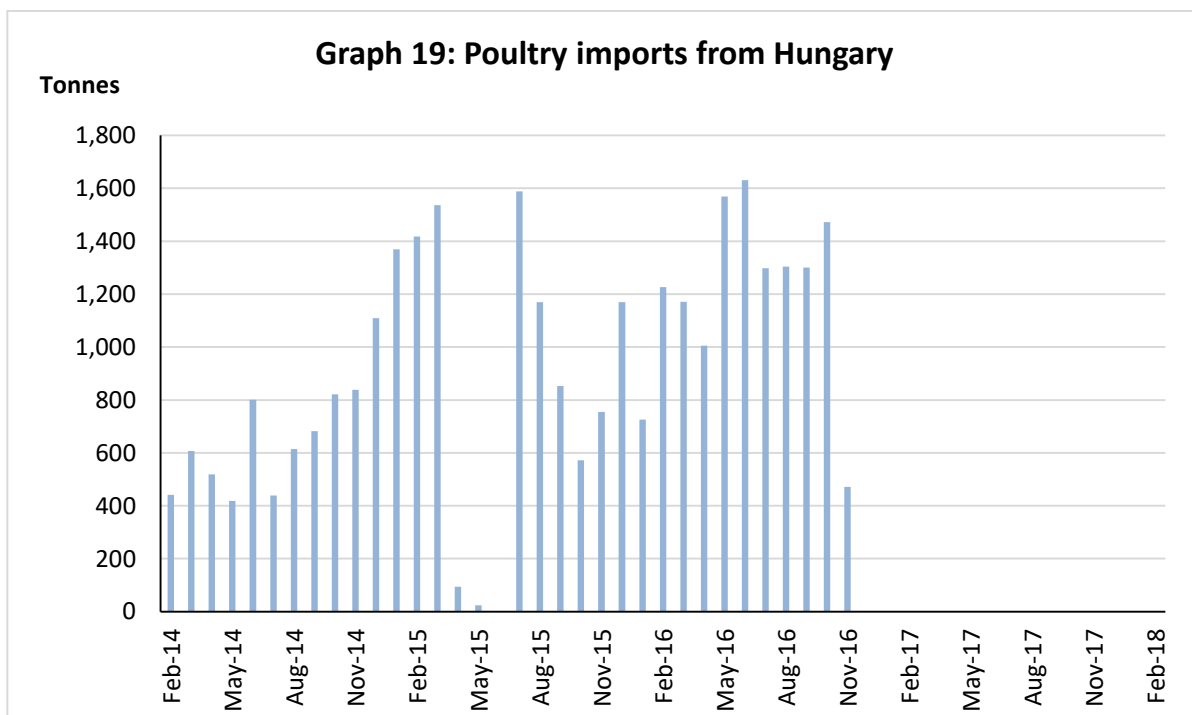
Poultry imports from Denmark for February 2018:

<i>Tariff</i>	<i>Description</i>	<i>Import Quantity in kg</i>	<i>FOB Import Price in R</i>	<i>Unit Price in R per kg</i>
0207.1290	Chicken: Not cut in pieces, frozen, whole and half chickens	20,104	R 388,493	R 19.32
0207.1421	Chicken: Offal: Livers	25,880	R 288,584	R 11.15
0207.1429	Chicken: Offal: Other	26,790	R 371,025	R 13.85
0207.1493	Chicken: Other: Leg quarters	1,288,124	R 24,676,706	R 19.16
0207.1495	Chicken: Other: Wings	668,439	R 14,963,901	R 22.39
0207.1497	Chicken: Other: Thighs	275,940	R 4,945,298	R 17.92
0207.1498	Chicken: Other: Drumsticks	57,000	R 1,216,354	R 21.34
0207.1499	Chicken: Other: Other	138,000	R 982,820	R 7.12
Total for:	Denmark in February 2018	2,500,277	R 47,833,181	R 19.13

In 2016, Denmark exported 9 779 t of poultry products to South Africa, compared to 9 508 t during 2015; an increase of 2.9 %. Imports from Denmark in 2017 totalled 16 884 t; 72.7 % more than in 2016.

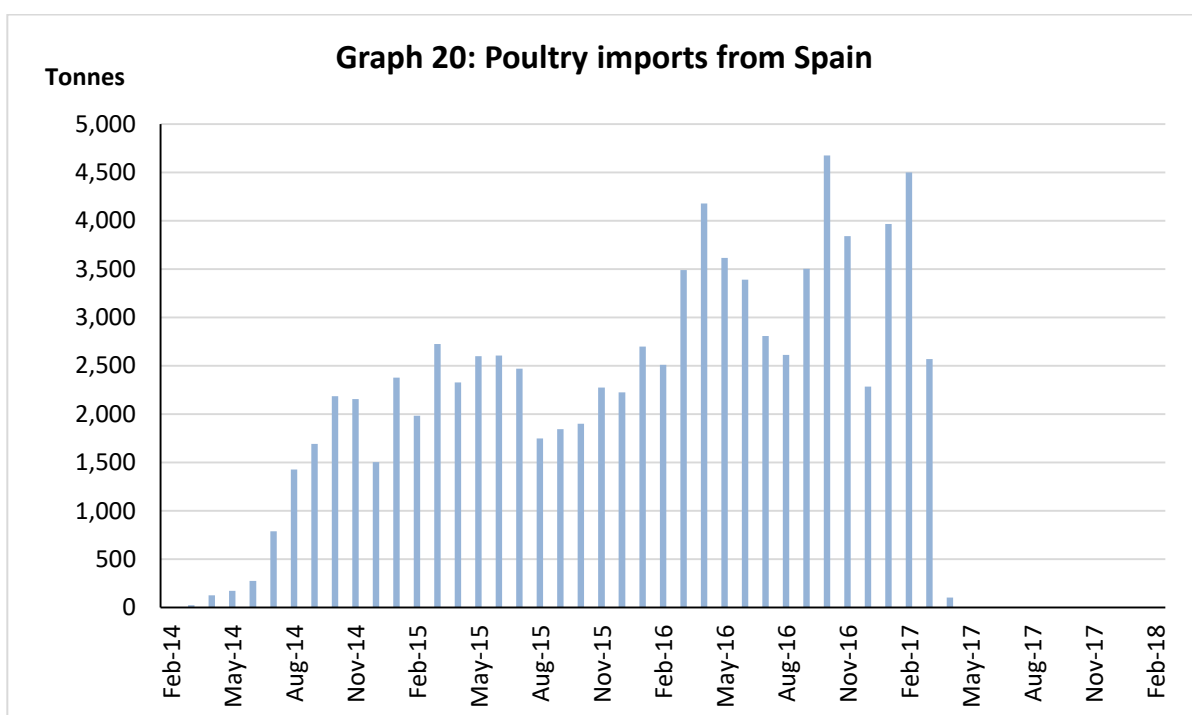
3.2.7 Poultry imports from Hungary for February 2018:

No poultry meat was imported from Hungary in February 2018 (Graph 19). In 2016, Hungary exported 13 174 t of poultry products to South Africa, compared to 10 547 t during 2015; an increase of 24.9 %. Nothing was imported through 2017.



Hungary experienced a single avian influenza event in late March 2015, which was declared resolved in an OIE report issued on the 8 April 2015. However, since 1 December 2016, Hungary has reported 294 outbreaks (206 045 cases) of H5N8 HPAI in poultry operations housing fattening turkeys, geese and ducks. Only 135 of the cases have been in wild birds. There have been 95 772 deaths amongst the birds and almost 2 million birds have been culled. The last case reported to the OIE was dated 18 April 2017 and a final report was submitted on 16 June 2017.

3.2.8 Poultry imports from Spain for February 2018:



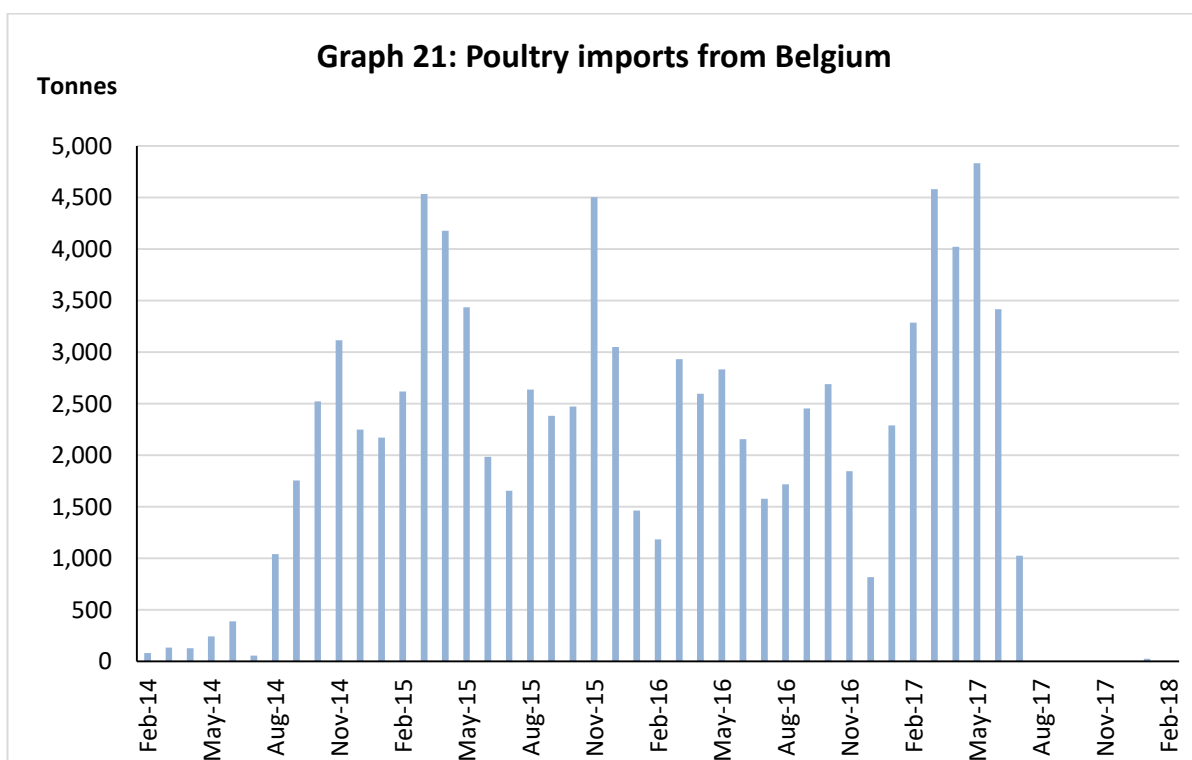
In February 2018, no poultry meat was imported from Spain. On 3 January 2017, Spain reported a single case of H5N8 HPAI in a wild greylag goose to the OIE; found in the central north of the country. On 18 February, highly pathogenic H5N8 was found on a commercial duck farm in the province of Catalonia. A pre-emptive cull of 17 077 birds followed the death of 723 ducks. This event increased to ten outbreaks, with 997 cases and nearly 27 000 birds culled. No further cases have been reported after 18 February 2017 and the Spanish submitted a final report to the OIE on 30 May 2017, reclaiming the country’s HPAI-free status with effect from 2 June 2017.

In 2016, Spain exported 39 620 t of poultry products to South Africa, compared to 27 090 t during 2015; an increase of 46.3 %. Accumulated imports from Spain in 2017 totalled 11 138 t; 61 % less than in 2016.

3.2.9 Poultry imports from Belgium for February 2018:

From late January 2017, Belgium reported H5N8 HPAI in wild birds in the central provinces of the country: Oost-Vlaanderen, Vlaams Brabant and Wallon Brabant; and in Limburg province, neighbouring the Netherlands. Between 22 May and 7 July, the country reported at least eleven outbreaks of HPAI in domestic poultry in the provinces of Luxembourg, Hainut, West Vlaanderen, Liege and Namur (the southern provinces of Belgium, bordering France). Confusingly, this report was labeled “non-poultry” on the OIE site, despite being in domestic-type birds. The last reported case was on 7 July and a final report was submitted on 24 July 2017.

These were the first HPAI events in domestic poultry in Belgium in seven years and the July to December 2017 crash in Belgian imports relates directly to these outbreaks. There were signs that the Belgians were returning to the market (340 *kilogrammes* in December 2017 and 23 *tonnes* in January 2018 (Graph 21; volume too small to be visible)), but no Belgian imports were recorded in February 2018.



In 2016, Belgium exported 24 256 t of poultry products to South Africa, compared to 35 613 t during 2015; a decrease of 31.9 %. Imports from Belgium in 2017 totalled 23 451 tonnes; 3.3 % down on 2016.

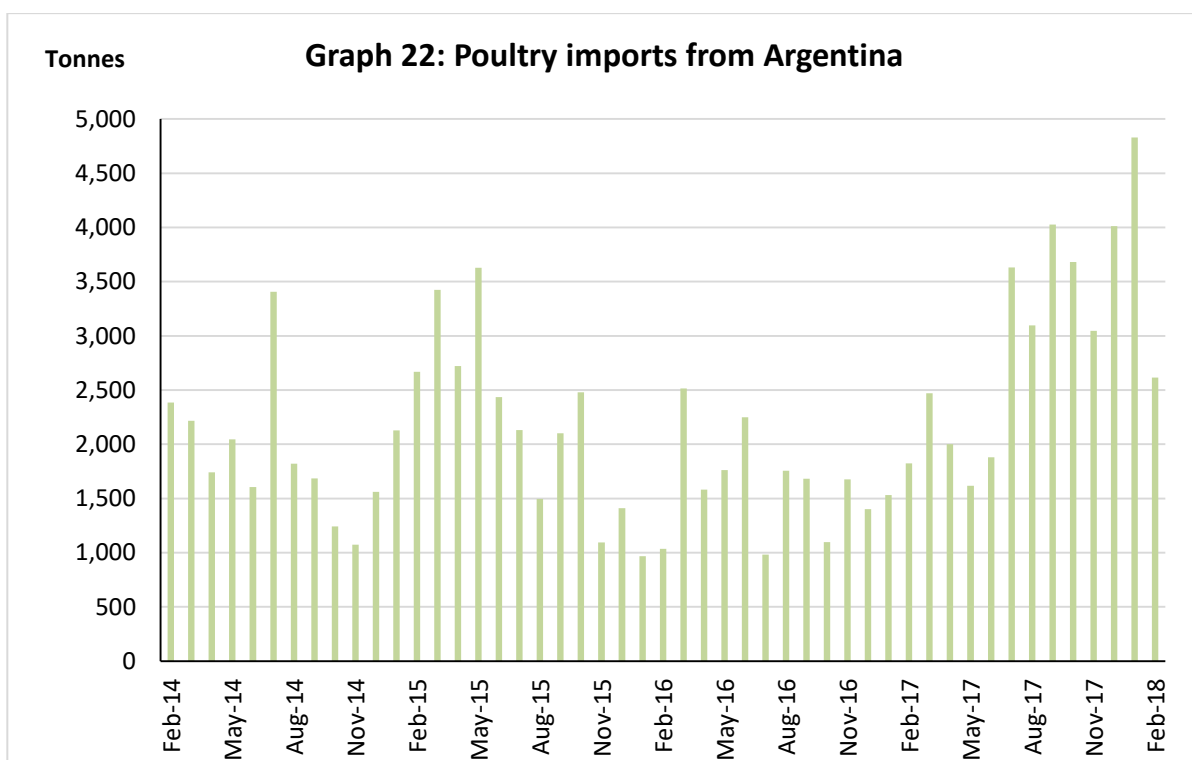
3.2.10 Poultry imports from Poland for February 2018:

Poland entered the South African market in August 2016. In February 2018, no imports of poultry meat were received from Poland.

On 7 December 2016, Polish veterinary authorities notified the OIE of H5N8 HPAI in wild birds (24 cases). Poland reported a total of 133 outbreaks of HPAI (56 227 cases) in wild birds, backyard flocks and commercial poultry. On 27 January, Poland added 2 cases of H5N5 in wild swans, reported from the west of the country. Over 1 million birds were culled in response to the outbreak but the last outbreak was recorded on 15 March 2017 and Poland submitted a final report to the OIE on 20 April. The species of domestic bird affected in the outbreaks is not specified in the OIE report. In 2016, 4 773 t of Polish poultry products were imported but Poland has been excluded from the South African market from February 2017.

3.3 Poultry imports from Argentina for February 2018:

In February 2018, 2 616 t of poultry meat were imported from Argentina at an FOB value of R26.3 m (Graph 22). Imports decreased by 45.9 % (- 2 216 t) on a monthly basis but increased by 43.3 % on a yearly basis (+ 790 t). During this month, 6.5 % of total poultry imports came from Argentina; and 16.9 % of Argentinian imports were chicken carcasses; 6.1 % frozen chicken offals (livers and other); 3.0 % frozen whole chickens; 33.7 % frozen chicken leg quarters; and 40.3 % other frozen chicken bone-in portions (wings, breasts and other).



In 2016, Argentina exported 18 713 t of poultry products to South Africa, compared to 27 718 t during 2015; a decrease of 32.5 %. Accumulated imports from Argentina totalled 32 816 t in 2017; 75.4 % up on 2016.

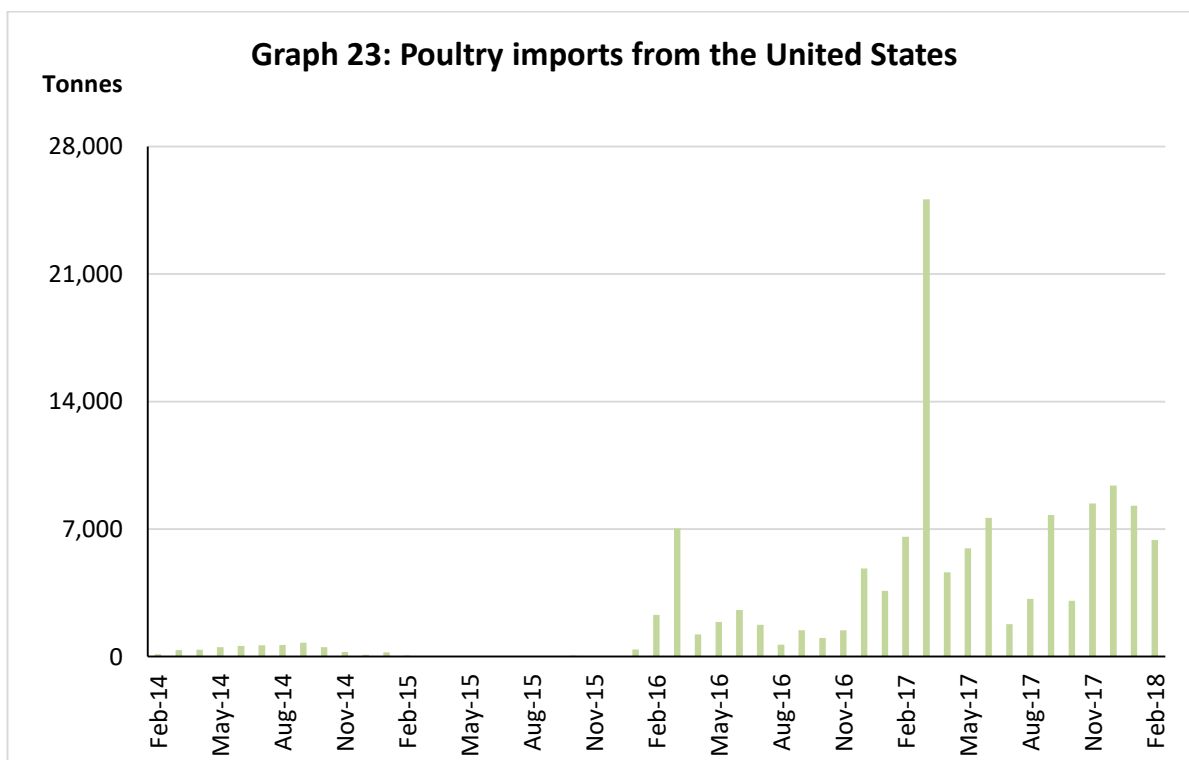
Poultry imports from Argentina for February 2018:

Tariff	Description	Import Quantity in kg	FOB Import Price in R	Unit Price in R per kg
0207.1220	Carcasses (excluding necks and offal) with all cuts (e.g. thighs, wings, legs and breasts) removed	440,820	R 1,635,234	R 3.71
0207.1290	Chicken: Not cut in pieces, frozen, whole and half chickens	79,126	R 897,719	R 11.35
0207.1421	Chicken: Offal: Livers	76,426	R 544,259	R 7.12
0207.1429	Chicken: Offal: Other	84,145	R 342,182	R 4.07
0207.1493	Chicken: Other: Leg quarters	880,775	R 11,080,433	R 12.58
0207.1495	Chicken: Other: Wings	603,460	R 9,938,961	R 16.47
0207.1496	Chicken: Other: Breasts	27,000	R 226,984	R 8.41
0207.1499	Chicken: Other: Other	423,855	R 1,671,207	R 3.94
Total for:	Argentina in February 2018	2,615,607	R 26,336,979	R 10.07

3.4 Poultry imports from the USA in February 2018:

Imports of frozen bone-in portions, until recently subject to anti-dumping duties, resumed from the USA in January 2016. Imports from the US totalled a staggering 25 103 t in March 2017 as annual quota was filled; up 18 521 t (+ 281 %) on March 2016 imports (Graph 23).

Imports in February 2018 totalled 6 396 tonnes and were valued at R66.8 million (FOB). Imports were down 22.8 % (- 1 886 t) on January's imports and down 186 % on February 2017 levels (- 186 t).



February's imports from the US included 63.4 % frozen chicken leg quarters; 20.5 % frozen chicken drumsticks; 3.4 % frozen chicken wings; 3.3 % frozen chicken thighs; 0.8 % frozen chicken offal ("other"); 3.6 % boneless chicken breasts; and 4.2 % frozen turkey cuts/offal. American imports accounted for 15.9 % of total imports in February 2018.

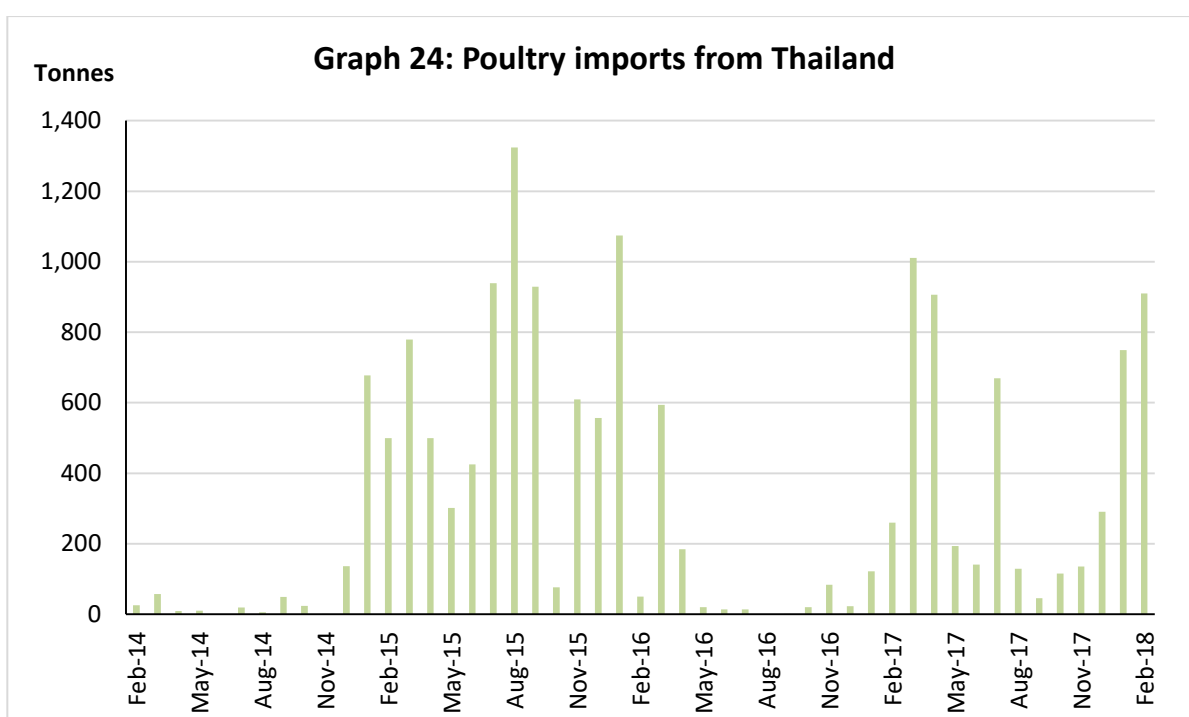
Poultry imports from the US for February 2018:

Tariff	Description	Import Quantity in kg	FOB Import Price in R	Unit Price in R per kg
0207.1411	Chicken: Boneless cuts: Breasts	228,187	R 4,224,273	R 18.51
0207.1429	Chicken: Offal: Other	52,834	R 565,465	R 10.70
0207.1493	Chicken: Other: Leg quarters	4,055,979	R 38,640,337	R 9.53
0207.1495	Chicken: Other: Wings	217,272	R 1,954,323	R 8.99
0207.1497	Chicken: Other: Thighs	213,932	R 1,631,374	R 7.63
0207.1498	Chicken: Other: Drumsticks	1,309,111	R 14,434,201	R 11.03
0207.1499	Chicken: Other: Other	48,988	R 453,869	R 9.26
0207.2700	Turkey: Cuts and offal, frozen; Frozen Turkey portions and MRM	269,885	R 4,930,096	R 18.27
Total for:	United States in February 2018	6,396,188	R 66,833,938	R 10.45

A total of 331 t of poultry meat was imported during 2015 from the USA. In 2013 and 2014, an estimated 11 076 and 5 022 t entered SA, so imports had dropped substantially in two years. However, in 2016, 26 573 t of poultry products were imported from the US. Imports from the US in 2017 totalled 87 059 t (+ 228 % up on 2016). Between April 2016 and March 2017, the US exported 46 456 tonnes of bone-in portions, out of a quota of 65 000 tonnes.

The US reported a case of H5N2 in a hunted mallard duck in Fergus County, Montana (27 December 2016) and two outbreaks of H7N9 in separate broiler breeder flocks in Lincoln County, Tennessee (3 and 13 March 2017). In these outbreaks, 128 000 breeders were culled. No further cases were reported in 2017.

3.5 Poultry imports originating from other countries:



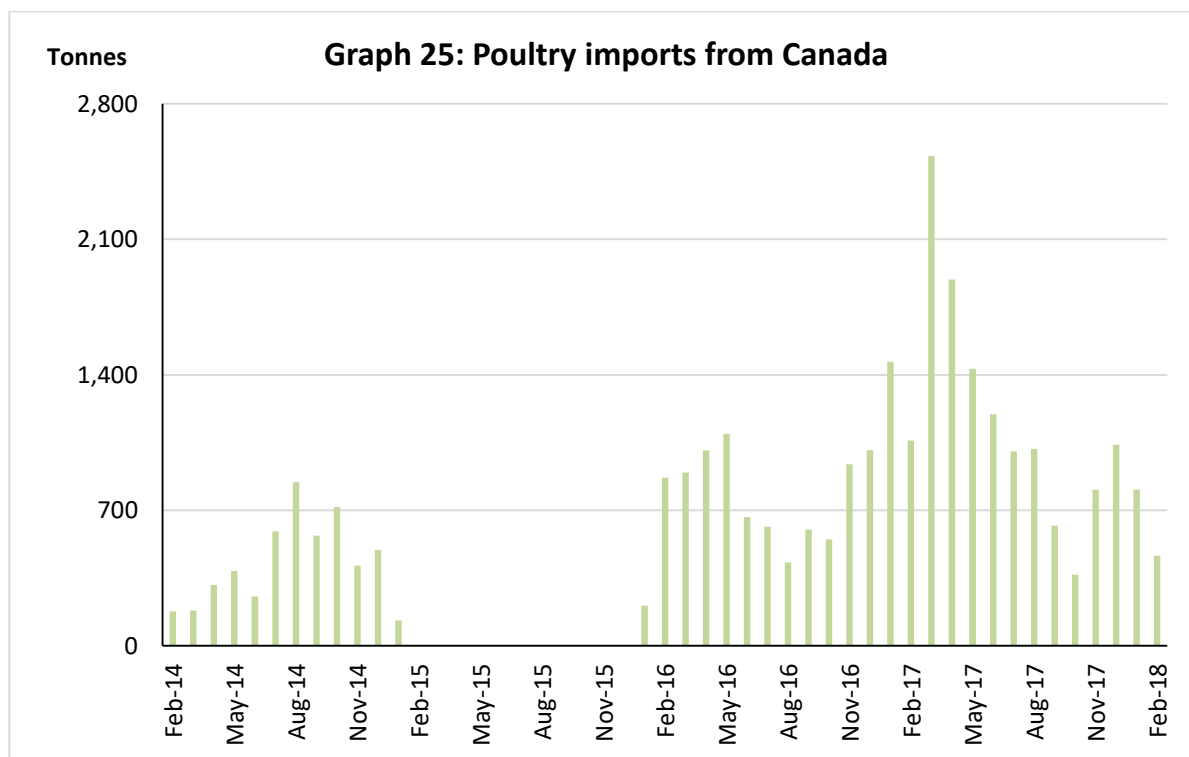
In February 2018, 910 t of poultry meat were imported from Thailand (Graph 24), up from 749 t in January (+ 160 tonnes; + 21.4 %). In February, 87.9 % of the Thai imports were mechanically deboned chicken (MDM); 5.1 % frozen boneless chicken cuts (breasts) and 5.5 % duck products. Thailand accounted for 2.3 % of total poultry exports in February; at an FOB value of R7.2 million.

Poultry imports from Thailand for February 2018:

Tariff	Description	Import Quantity in kg	FOB Import Price in R	Unit Price in R per kg
0207.1210	Chicken: Not cut in pieces, Frozen Mechanically Deboned Meat	799,620	R 3,319,577	R 4.15
0207.1411	Chicken: Boneless cuts: Breasts	46,200	R 1,331,832	R 28.83
0207.1496	Chicken: Other: Breasts	36	R 483	R 13.42
0207.4200	Ducks, Not cut in pieces, frozen	44,860	R 1,248,003	R 27.82
0207.4500	Ducks, Other, frozen	5,244	R 370,184	R 70.59
1602.3290	Chicken: Flavoured, herbed or marinated	13,752	R 895,125	R 65.09
Total for:	Thailand in February 2018	909,712	R 7,165,204	R 7.88

In 2016, Thailand exported 2 078 t of poultry products to South Africa, compared to 7 616 t during 2015; a decrease of 72.7 %. Imports from Thailand in 2017 totalled 4 019 t; an increase of 93.4 % on 2016.

In February 2018, 465 t of poultry meat were imported from Canada at an FOB value of R7.2 m (Graph 25). Canadian imports made up 1.2 % of total poultry imports into South Africa in February and were down 42.4 % on January 2018 levels (- 342 t). Imports were down 595 tonnes (- 56.1 %) on February 2017 levels. Of the Canadian imports in February, 77.2 % was frozen turkey cuts and offal and 22.8 % was frozen chicken bone-in drumsticks.



Poultry imports from Canada for February 2018:

<i>Tariff</i>	<i>Description</i>	<i>Import Quantity in kg</i>	<i>FOB Import Price in R</i>	<i>Unit Price in R per kg</i>
0207.1498	Chicken: Other: Drumsticks	106,000	R 1,475,049	R 13.92
0207.2700	Turkey: Cuts and offal, frozen; Frozen Turkey portions and MRM	359,469	R 5,725,295	R 15.93
Total for:	Canada in February 2018	465,469	R 7,200,344	R 15.47

In 2016, 8 884 t of poultry products were imported from Canada. Accumulated imports from Canada in 2017 totalled 14 431 t; up 62.4 % on 2016.

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