



# The South African **Poultry** Sector Master Plan



November 2019



**the dtic**  
Department:  
Trade, Industry and Competition  
REPUBLIC OF SOUTH AFRICA

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## Acronyms used in this report

AfCFTA	African Continental Free Trade Area
AgriSETA	Agricultural Sector Education Training Authority
AMIE	Association of Meat Importers and Exporters
BEE	Black Economic Empowerment
DALRRD	Department of Agriculture, Land Reform and Rural Development
DOH	Department of Health
<b>the dtic</b>	Department of Trade, Industry and Competition
EBIESA	Emerging Black Importers and Exporters of South Africa
EU	European Union
FAWU	Food and Allied Workers Union
FoodBev SETA	The Food and Beverage Manufacturing Sector Education Training Authority
IDC	Industrial Development Corporation
ITAC	International Trade Administration Commission
MDM	Mechanically Deboned Meat
SA	South Africa
SABS	South African Bureau of Standards
SADC	Southern African Development Community
SAPA	SA Poultry Association
SARS	South African Revenue Service
SPS	Sanitary and Phyto-Sanitary
Stats SA	Statistics South Africa
TIPS	Trade and Industry Policy Secretariat

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This Poultry Sector Master Plan has been developed in a close partnership between Government and a number of stakeholders in the industry, drawn from poultry farmers, processors, exporters, importers and organised labour.

It provides a framework for a determined effort to grow the output (and jobs) in the industry through a number of measures that will be implemented over a number of years. Significantly, it sets out a new, joint vision across the value-chain, identifies five pillars that underpin the vision and creates a Poultry Sector Master Plan Council to monitor and drive implementation of the pillars.

The parties that contributed to the Master Plan include:

- The Ministries of Trade, Industry and Competition as well as Agriculture, Land Reform and Rural Development (DALRRD)
- Local poultry producers, through the SA Poultry Association (SAPA) as well as a number of independent producers, including poultry farmers who are contracted to large integrated producers as well as independent producers
- Poultry traders, represented by their industry bodies, the Association of Meat Importers and Exporters (AMIE) and Emerging Black Importers and Exporters of South Africa (EBIESA)
- Organised labour, through the Food and Allied Workers Union (FAWU)
- Other interested parties including the South African Association of Meat Processors
- Government entities, through the Department of Trade, Industry and Competition (**the dtic**); the Department of Agriculture, Land Reform and Rural Development; the Department of Health; the Trade and Industry Policy Secretariat (TIPS), the Industrial Development Corporation (IDC); the Land Bank; and the International Trade Administration Commission (ITAC).

Each constituency recognises the need for it to contribute practically to building a strong and competitive industry, and the Master Plan sets out the commitments by the parties.





# 2 Overview and background analysis

## The poultry sector plays a key role in South African life:

- It provides an important, affordable source of protein for millions of households, and is a staple of the South African dinner table
- It is a pillar of the South African agricultural economy, adding value to our maize and soya crops, and serving as a key customer of the farming sector, including a significant number of emerging farmers
- Barriers to entry are reasonably low, allowing emerging farmers and small scale participants and local economies to supplement industrial scale activity
- Poultry is also an important sector of food processing, adding value and creating jobs throughout the length and breadth of the country.

The demand for poultry products has grown substantially in the democratic era, partly reflecting higher incomes across the South African population. For the first 15 years of democracy, the production of poultry also grew but this began to stagnate around 2008. Production has been static for the last decade despite the fact that consumption has continued to grow. This has happened because imported poultry has come into the economy in large quantities, displacing South African meat especially at the lower end. Tariffs were increased substantially in 2013, but this has not arrested the growth in imports.

Some of our large poultry production companies are regarded as highly efficient in their production systems. Despite this we have been unable to compete effectively with imports especially at the lower end of the price range, and we have failed to grow exports.

Figure 1: SA Poultry Production, Consumption and Imports, 2011-2018 (tons)

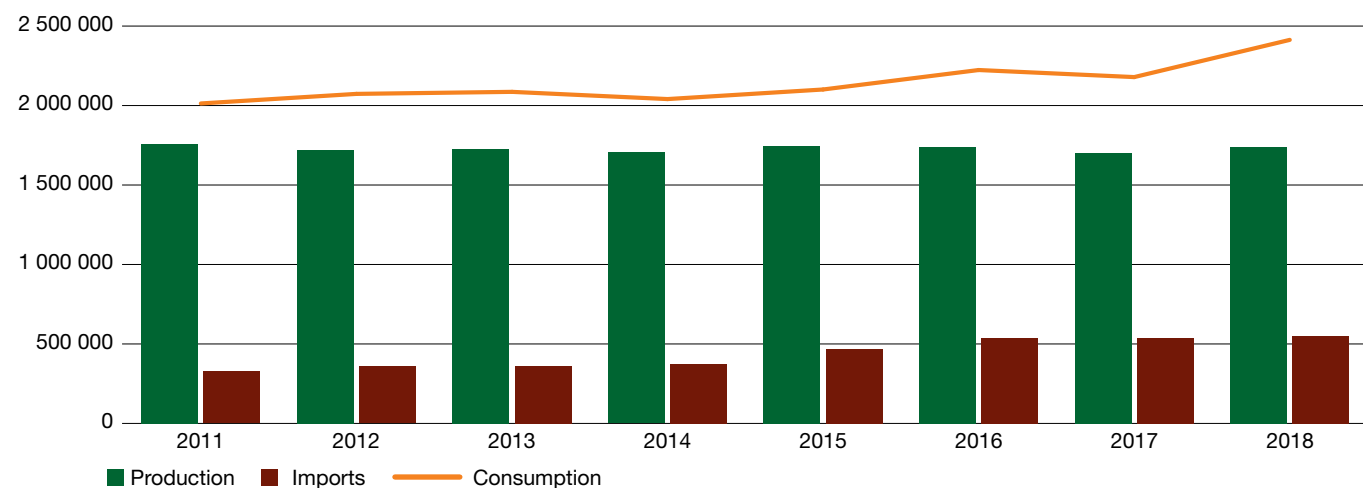


Figure 1 demonstrates clearly that:

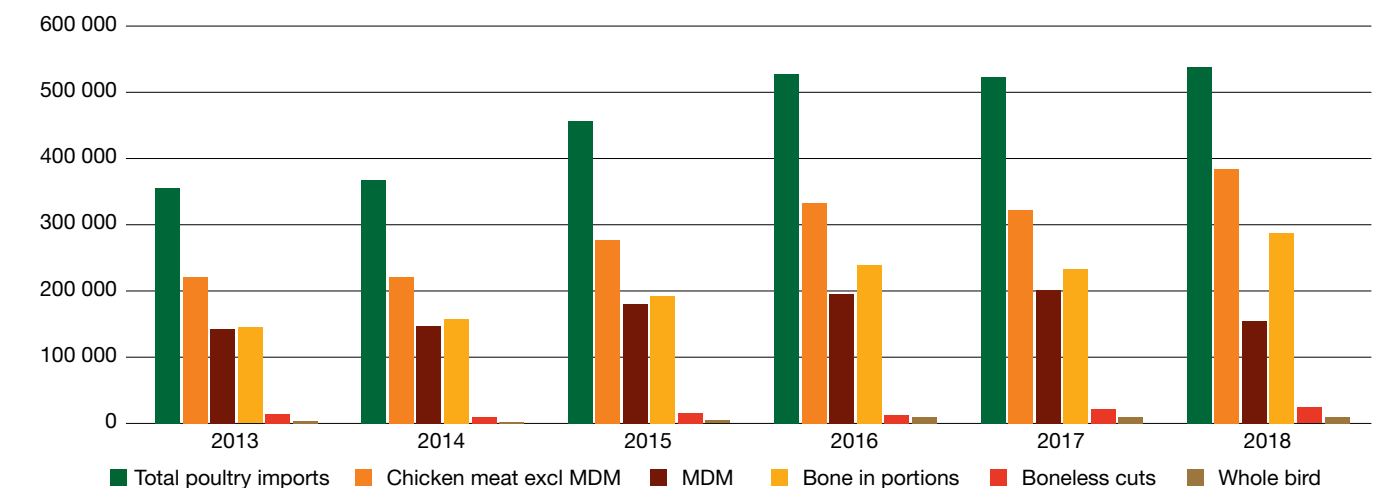
- Consumption of chicken meat in South Africa has grown substantially although more slowly after 2008
- Production has stagnated as imports have risen, with imports having risen fourfold over 20 years.

The potential growth in local production has therefore been displaced by imports. This has mainly been due to the lower prices at which imports have come into our market. Market conditions and trade agreements have brought significant quantities of low-priced chicken products into our market. These have put pressure on local prices and reduced the market share of South African producers. While there may have been benefit for consumers, we have been unable to drive growth in the industry. At the same time we have been unable to make up the differential through exports. At present South African poultry exports are marginal at about 2% of production despite excellent access to a variety of markets. As a result, our industry is now vulnerable, and faces significant threats to our existing capacity.

Detailed trade figures demonstrate that imports have continued to grow even when we exclude meat products that are not made in South Africa such as Mechanically Deboned Meat (MDM). Indeed, imports of broiler meat (excluding MDM) have increased by 73% over the past five years.

If this trend is not reversed then the South African industry can be expected to stagnate and slowly decline affecting jobs and livelihoods across the value chain from maize and soya farming to food processing. It would also threaten our food security in the longer term.

Figure 2: SA Poultry Imports, 2013-2018 (tons)



## Urgent challenges facing the sector

It is clear that the South African industry faces critical challenges, some of which are structural and others that are driven by factors over which we have greater control:

1. **Cost of feed:** The cost of feed makes up a large portion of the cost of chicken production. Maize and soya prices are determined internationally but tend to rise for South African producers in drought years. Many countries subsidise their primary farming sector, allowing cheaper inputs to their poultry sectors.
2. **Scale of production:** The reasonably small scale of production in South Africa makes us vulnerable to exporting countries which exploit economies of scale. In addition, we tend to slaughter broilers at a lower weight than our competitors, placing us at a disadvantage in certain markets.
3. **Segmenting production:** In recent years several large poultry exporting countries have targeted South Africa's market for brown meat. These exporters provide white meat to the European and American market where much higher prices are paid for breast meat, and exported the remaining brown portions to South Africa at low prices. This is known in the trade as 'balancing the carcass' and is widely practised.
4. **Inability to export:** Despite the fact that we have tariff-free access to Europe we have not been able to export poultry to Europe largely because we have not developed the necessary systems to meet the sanitary and phytosanitary requirements of the European market. Our exports to other countries are also very limited, with exports making up no more than 2% of production. This has limited our ability to compete, and to grow our industry.
5. **Transformation:** Although some progress has been made, we have not moved sufficiently with regard to black ownership throughout the value chain. Some immediate opportunities exist to improve the situation.

# 3

## Strategic objectives

Poultry farming offers important opportunities for economic development in South Africa including:

- Potential expansion of both maize and soya production
- Growing small-scale poultry farming and local production networks
- Commercial-scale contract farming supplying large integrated producers
- Growth in industrial-scale food processing, leading to increased employment and exports
- The supply of affordable protein to South African households

In line with these opportunities, South Africa needs to grow the poultry sector and to protect against potential loss of capacity. Indeed, there is substantial potential to expand the poultry industry across the value chain, especially if we can develop substantial export markets.

Our strategic outlook on trade can be described as follows:

Poultry is an increasingly traded product. Poultry producers are effectively divided into two groups – a large group of countries that produce at the scale of their domestic market and a smaller group that produce at greater scale and maximise exports. South Africa has fallen into the former group and has been targeted by countries that are pursuing an export oriented strategy. Given the fact that we have a fairly large market for poultry and an open economy we are likely to continue to receive attention from exporters.

Imports have an important role to play in balancing our poultry sector. In particular:

- Imports can help to keep local prices in check
- There are certain poultry products that do not get produced in South Africa (such as MDM) that need to be imported
- There are certain cuts that are produced locally but where demand outstrips local supply, especially at certain times of the year

At the same time, we need to expand our poultry sector and avoid losing local capacity. Our aim is therefore to contain imports. In addition, we should act decisively against unfair forms of trade and any attempts to dump poultry products in our market.

In 2018 we imported 383 000 tons of chicken (excluding MDM), which represents about 19% of consumption. The level of imports needs to be stabilised and reduced if we are to stabilise and grow our industry.

**Our strategic objectives are therefore to:**

1. Continue to increase the consumption of chicken meat (as opposed to processed chicken product) in absolute terms, and on a per capita basis.
2. Ensure that locally produced product makes up an increasingly larger proportion of consumption over time.
3. Export cooked and raw product to Southern African Development Community (SADC) and other African Continental Free Trade Area (AfCFTA) countries, the European Union (EU), and the Middle East. We aim to export at least 3-5% of production by 2023, 7-10% by 2028 and a growing proportion thereafter.
4. Expand the industry by increasing capacity at all stages of the value chain – farming of feed, farming of chickens and processing of poultry product – thereby increasing fixed investment, employment and the value of output. The output of poultry products should increase by around 10% within three years.
5. Increase the level of black participation and particularly ownership across the value chain and increase employment and worker share-ownership in the sector.





# Required actions

In order to achieve these objectives, we will have to take specific and sustained actions. These are set out in the five pillars that are appended to this document and constitute the heart of this plan.

### Monitoring and implementation

This Master Plan serves as a basis for the expansion and development of the sector. Success will require sustained implementation and ongoing commitment by a variety of players. It will be critical to monitor progress against this plan. This will be done through the Poultry Sector Master Plan Council, which will be led by the Ministers of Trade, Industry and Competition, and Agriculture, Land Reform and Rural Development.

It is envisaged that the Council will meet quarterly in the first year and bi-annually thereafter. **the dtic** will serve as a secretariat to the Council and will be assisted in this regard by DALRRD and SAPA. Details of Council membership will include principals from:

- Poultry producers, including large integrated producers, contract farmers, and independent producers
- Poultry importers and exporters
- Organised labour
- Government departments including **the dtic**, DALRRD, Department of Health, and provinces
- Other state institutions such as the South African Revenue Service (SARS) (Customs), Industrial Development Corporation (IDC), Land Bank and others as appropriate.

### The Council will inter alia, address the following:

- Develop a concrete action plan to underpin each pillar and commitment in the Master Plan
- Monitor implementation of the key actions agreed and identify additional measures required to realise the agreed vision
- Ensure expeditious implementation of the necessary sanitary and phyto-sanitary (SPS) measures required to expand into export markets
- Analyse the trade in poultry, both imports and exports, to determine the impact of the Master Plan and to advise on measures to realise the vision and commitments in the Master Plan
- Identify and set out targets for advancement of ownership by black South Africans and workers across the poultry value-chain, as well as inhibitors to achieve these
- Consider practices and standards in the industry and their impact of development of smaller and/or black-owned poultry enterprises, with a view to addressing unnecessary inhibitors
- Set up a forum of engagement with the finance sector.

## Pillar One: Expanding and improving production – targets to be met by 2023

### 1.1: Programme: Strategic partnership between SAPA and Grain SA to increase the supply of maize and soya to the poultry sector and to reduce prices

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>• Expand the consumption of poultry feed by 300 000 tons p.a.</li> <li>• Explore mechanisms to use this higher level of demand to negotiate better prices</li> </ul>	<ul style="list-style-type: none"> <li>• Additional 300 000 ton consumption of soya/maize supporting approximately 300 new jobs</li> </ul>	<ul style="list-style-type: none"> <li>• IDC to partner with Grain SA and SAPA to explore possible arrangements to increase supply in targeted areas, and to reduce costs</li> <li>• Council to identify additional steps to achieve this goal</li> </ul>

### 1.2: Programme: Increased scale of production and investment to meet increased demand and to support exports

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>• Increase production of broilers by 1.7 million birds per week (9% increase over three years)</li> <li>• Expansion of production facilities, including production of cooked chicken for export</li> </ul>	<ul style="list-style-type: none"> <li>• SAPA members to produce 1.7 million additional birds per week</li> <li>• R1.5 billion investment in production facilities by SAPA members of which 80% completed by 2020</li> <li>• Additional 3 600 jobs</li> </ul>	<ul style="list-style-type: none"> <li>• <b>the dtic</b> and SAPA to establish mechanism to report and track investment and production commitments twice annually</li> </ul>

### 1.3: Programme: Expand and improve the contract farming sector:

- Establish 50 new commercial-scale contract farmers with agreements to supply specified large integrated producers
- Review the commercial arrangements to ensure that contract farmers receive fair and equitable compensation and fair access to inputs

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>• SAPA members to help establish and sign contracts with 50 new contract farmers (in addition to the existing 70 commercial-scale contract farmers already in business)</li> <li>• SAPA and contract farmers to review and report on commercial arrangements</li> <li>• SAPA to initiate discussions with insurance industry to identify effective insurance cover for contract farmers</li> </ul>	<ul style="list-style-type: none"> <li>• 50 contract farming operations at a cost of approximately R35 million each or R1.7 billion</li> <li>• Approximately 1 000 new jobs</li> </ul>	<ul style="list-style-type: none"> <li>• SAPA to initiate, lead and coordinate the process of establishing 50 new contract farmers</li> <li>• SAPA members to sign offtake agreements and to provide direct farming and other assistance to contract farmers</li> <li>• In addition to the above, the Land Bank to assist with finance for land where appropriate and IDC to consider Poultry scheme to help fund additional expansion of production for contract and independent farmers</li> <li>• Poultry Master Plan Council to receive report on commercial arrangements between contract farmers and producers</li> </ul>

### 1.4: Programme: Improve productivity and worker development through investment in skills

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>• Employers and labour to develop or enhance training initiatives aimed at greater efficiency, clear career progression and improved employment equity</li> </ul>	<ul style="list-style-type: none"> <li>• Large and medium employers, trade unions and the relevant SETAs to develop strategic plan for skills enhancement in the sector by Q3 of 2020</li> </ul>	<ul style="list-style-type: none"> <li>• SAPA, AMIE, EBIESA and individual employers</li> <li>• Trade Unions/Labour representatives</li> <li>• FoodBev SETA</li> <li>• AgriSETA</li> </ul>

### 1.5: Programme: Expand support to independent farmers

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>Work with provincial governments, industry players, development agencies and non-profit organisations to provide support to independent poultry farmers</li> </ul>	<ul style="list-style-type: none"> <li>Affected provinces to review existing grants and to target these to support independent and contract farmers</li> <li>SAPA to initiate and implement programme of support, including support in relation to animal health</li> <li><b>the dtic</b> and DALRRD (with industry support) to initiate discussions with insurance industry to consider effective insurance products for small-scale farmers and to report to SA Poultry Master Plan Council</li> </ul>	<ul style="list-style-type: none"> <li>DALRRD and <b>the dtic</b> to lead</li> <li>Provinces to contribute</li> <li>SAPA to put viable support plan for independent farmers to Council for consideration and approval</li> <li>African Farmers Association of South Africa to contribute</li> </ul>

### 1.6: Programme: Increase levels of Black empowerment and particularly Black ownership

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>Promote improved BEE in the sector, especially among integrated producers and link to state procurement</li> <li>Promote Worker Share Ownership Programmes, especially within integrated producers</li> <li>Leverage existing state ownership and existing provincial funding streams to catalyse additional Broad-Based Black ownership</li> </ul>	<ul style="list-style-type: none"> <li>Explore the use of the Agri BEE fund</li> <li>IDC and Land Bank to consider partnering with existing contract producers to grow further and develop beyond contract farming</li> </ul>	<ul style="list-style-type: none"> <li><b>the dtic</b> to initiate discussions with various players</li> <li>Integrated producers to report on their levels of Black empowerment and on initiatives to improve BEE levels and performance</li> <li>AMIE and SAPA to present proposals for mechanisms and targets to increase levels of Black ownership throughout the sector</li> <li>Council to finalise targets and timeframes</li> </ul>

## Pillar Two: Driving domestic demand and promoting affordability

### 2.1: Programme: State procurement: Consider designating chicken meat for local supply

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li><b>the dtic</b> to investigate possible designation of poultry, which would ensure that all state procurement of poultry be designated for local supply only</li> <li><b>the dtic</b>/Treasury to discuss pricing mechanism with the industry to ensure value for money for state institutions</li> </ul>	<ul style="list-style-type: none"> <li>Extent and nature of state poultry procurement to be established by Q2 of 2020</li> <li>Decision on designation by Q3 of 2020</li> </ul>	<ul style="list-style-type: none"> <li><b>the dtic</b> with support of DALRRD</li> <li>Industry to commit to competitive pricing for state procurement</li> </ul>

### 2.2: Programme: Monitor chicken prices

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li><b>the dtic</b> to work with Stats SA, wholesalers and retailers to monitor prices of various chicken products</li> </ul>	<ul style="list-style-type: none"> <li>Monitor and report prices to Poultry Master Plan Steering Committee with the assistance of the National Agricultural Marketing Council</li> <li>Monitor the impact of trade measures on prices</li> </ul>	<ul style="list-style-type: none"> <li><b>the dtic</b></li> </ul>

### 2.3: Programme: Promote further research into industry cost drivers and take action where appropriate

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>Work with the Bureau for Food and Agricultural Policy to investigate cost drivers for poultry production</li> </ul>	<ul style="list-style-type: none"> <li>Actions to be developed arising out of research</li> </ul>	<ul style="list-style-type: none"> <li><b>the dtic</b></li> <li>SAPA</li> </ul>

### 2.4: Programme: Task team to work with retailers to:

- Explore mechanisms to enhance offerings of cheaper packs of brown meat to price sensitive consumers
- Retailers to promote South African and where possible local suppliers
- Partnership between SAPA and Proudly SA to promote SA poultry

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>Discussions to be held between SAPA, <b>the dtic</b>, DALRRD and retailers</li> </ul>	<ul style="list-style-type: none"> <li>Buy South African poultry campaign</li> <li>Support for local poultry by retailers</li> </ul>	<ul style="list-style-type: none"> <li><b>the dtic</b></li> <li>SAPA</li> <li>AMIE</li> <li>DALRRD</li> </ul>

## Pillar Three: Driving exports

### 3.1: Programme: Export cooked meat to various markets

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>Requirements to be established urgently per destination and appropriate measures effected</li> </ul>	<ul style="list-style-type: none"> <li>Begin exporting Q1 2020</li> </ul>	<ul style="list-style-type: none"> <li>SAPA</li> <li>AMIE</li> <li><b>the dtic</b></li> <li>DALRRD</li> </ul>

### 3.2: Programme: Expand Halaal meat exports

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>Establish requirements for various markets in co-operation with red meat exporters and Halaal certification authorities and ensure that these requirements can be met and certified</li> </ul>	<ul style="list-style-type: none"> <li>Significant expansion in such exports by 2021</li> </ul>	<ul style="list-style-type: none"> <li>SAPA</li> <li>AMIE</li> <li><b>the dtic</b></li> <li>DOH</li> </ul>

### 3.3: Programme: Establish detailed export agreements with various countries including veterinary requirements

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>In various countries we have trade access but have not put the detailed systems in place to facilitate trade</li> </ul>	<ul style="list-style-type: none"> <li>Detailed programme by Q1 of 2020</li> </ul>	<ul style="list-style-type: none"> <li><b>the dtic</b></li> <li>DALRRD</li> <li>SAPA</li> <li>AMIE</li> </ul>

### 3.4: Programme: Establish detailed import requirements for selected countries under AfCFTA and make appropriate arrangements

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>Identify countries that may wish to procure South African poultry, in co-operation with industry, establish contact with the appropriate authorities and drive implementation</li> </ul>	<ul style="list-style-type: none"> <li>Detailed programme by Q1 of 2020 due to the limited time available before implementation</li> </ul>	<ul style="list-style-type: none"> <li><b>the dtic</b></li> </ul>

### 3.5: Programme: Sanitary and Phyto-Sanitary requirements

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>Further consultation to take place on the SPS plan</li> <li>AMIE to assist with relevant expertise</li> <li>Institutional mechanisms to be devised to ensure that SPS plan is funded, implemented and monitored</li> </ul>	<ul style="list-style-type: none"> <li>Substantial progress on all items by mid 2020</li> </ul>	<ul style="list-style-type: none"> <li>DALRRD</li> <li><b>the dtic</b></li> <li>DOH</li> <li>SAPA</li> <li>AMIE</li> </ul>

## Pillar Four: Enhancing the Regulatory Framework and ensuring compliance

### 4.1: Programme: Packaging and traceability of imports

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>Review the regulations governing the manner in which imported chicken must be packed and labelled with a view to ensuring that all imports can be traced to a single producer and that such producer meets the required standards</li> </ul>	<ul style="list-style-type: none"> <li>Regulations to be reviewed by end Q1 of 2020 and new regulations published as soon as possible thereafter</li> <li>Discussions to take place with SA Bureau of Standards and South African retailers to require clear labelling of origin</li> </ul>	<ul style="list-style-type: none"> <li><b>the dtic</b></li> <li>DALRRD</li> <li>DOH</li> <li>SABS</li> </ul>

### 4.2: Programme: Thawing of frozen product

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>Review regulations to prevent importers and local producers from thawing frozen meat and selling as fresh or refreezing, based on food safety risk</li> </ul>	<ul style="list-style-type: none"> <li>Regulations to be reviewed by end 2019 and new regulations published if required by Q1 of 2020</li> <li>Determine the extent to which responsibilities has been delegated to local authorities and whether such authorities are regulating effectively</li> </ul>	<ul style="list-style-type: none"> <li>DOH</li> <li><b>the dtic</b></li> <li>DALRRD</li> </ul>

### 4.3: Programme: Act effectively against incorrect classification and under-declaration

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>Review regulations to identify more effective ways to prevent incorrect classification of imports (reporting under the incorrect tariff line), under-declaration and other fraudulent practices and to prevent serial offenders from continuing to trade</li> </ul>	<ul style="list-style-type: none"> <li><b>the dtic</b> and SARS to review regulations by end Q1 of 2020</li> <li>Consider the implementation of an import licence system to make it easier to act against parties involved in illegal practises</li> <li>Set up a specific channel through <b>the dtic</b> for the industry associations to report, escalate and follow up on illegal or illicit transactions and to ensure that action is taken by the relevant authorities</li> </ul>	<ul style="list-style-type: none"> <li><b>the dtic</b></li> <li>SARS</li> </ul>

### 4.4: Programme: Act against Round tripping

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>Act against parties practising round tripping at the borders, particularly borders with our immediate neighbours</li> </ul>	<ul style="list-style-type: none"> <li>Consultation with Customs authorities with a view to investigating possible offences at relevant border posts, identify vulnerabilities in the system and address these</li> </ul>	<ul style="list-style-type: none"> <li><b>the dtic/SARS</b></li> </ul>

### 4.5: Programme: Selling of quotas

Requirements	Targets and Commitments	Oversight/Responsibility
<ul style="list-style-type: none"> <li>Ensure that where quotas exist, that parties comply with the rules for the use of quotas and that action is taken against on-selling and fronting</li> </ul>	<ul style="list-style-type: none"> <li>Consult with relevant authorities and implement</li> </ul>	<ul style="list-style-type: none"> <li><b>the dtic/SARS</b></li> </ul>

### 4.6: Programme: Effective communication measures to be established between authorities and the industry

Requirements	Targets and Commitments	Oversight/Responsibility
	<ul style="list-style-type: none"> <li>Set up a specific channel through <b>the dtic</b> for the industry associations to report, escalate and follow up on complaints</li> </ul>	

## Pillar Five: Trade measures to support the local industry

5.1: The parties note that the ITAC process will be concluded in terms of the applicable legal framework, and that this is expected soon.

5.2: Support efforts by Government to immediately direct ITAC to begin a further process of reviewing the tariff framework for the poultry industry as a whole, including the following:

- Reporting on the combined impact of discrete trade measures operating in the sector such as tariffs, anti-dumping measures, countervailing measures and preferential trade agreements
- Considering the introduction of specific rather than ad valorem tariffs
- Considering simplifying the trade system for poultry by reducing the number of tariff lines by operating at a six digit or limited eight digit-level
- Considering specific anti-dumping measures where appropriate and consider how these impact on the level of ad valorem tariffs
- Considering the introduction of import licences to support compliance and to collect statistical and other factual information on poultry imports to inform policy interventions
- Considering the introduction of a system of rebates whereby tariff levels on certain imports can be reduced where parties are achieving exports
- Considering the possibility of other measures such as entry price systems.



# 5

## Support for the Poultry Master Plan

The following parties have expressed support for the Poultry Master Plan, and commit to working towards achieving its outcomes:

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On behalf of the South African government

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On behalf of the South African Poultry Association

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On behalf of the Association of Meat Importers and Exporters

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On behalf of the Emerging Black Importers and Exporters South Africa

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On behalf of the Food and Allied Workers Union

# Appendix

### SAPA members:

Tatsoyafrica Corporate Trading & Projects  
Goodwill Chickens  
Cheyeza Farming  
Boshielo Farming  
Stonor Farm  
Opti Agri  
County Fair - A Division of Astral  
Bushvalley Chickens  
Steinthal Landgoed  
Ndiza Poultry Rearing Pty Ltd  
Fourie's Poultry Farms Pty Ltd T/A Chubby Chick  
Eagles Valley Poultry  
Umbuluzi Farm Chickens Pty Ltd  
JMB Harries Faming cc (RHBC44)  
Marsela Trading  
Anton Voere Pty Ltd T/A Chickcheeks Boerdery  
A & J Broiler Breeders Pty Ltd  
KwaZulu Natal Poultry Institute  
L & A Farming & Project  
Grandchicks Pty Ltd  
Tirisomaatla Projects & Trading  
Kwamhlanga Poultry Project Pty Ltd  
Poultry Harvest Pty Ltd  
Kwena Chicks  
Phetogo F Enterprise  
Warrenton Super Chickens  
Moyo Mnade Chickens  
Quantum Foods Pty Ltd  
Young Farmers Agric Business Pty Ltd  
Ndaba investigation Security  
Ndiambani Agric Coop  
Mashashane Hatchery  
African Ranchers Pty Ltd  
Essaurinca Farm 1 (RRBC0105)  
Kgwerano Hospitality Services  
RCL Food Consumer Pty Ltd  
Ryall Trading CC  
Rossgro Plumvee Eiers  
Bobbsies Chickens  
Westwood Poultry Farm Pty Ltd  
Goldi and Festive - A division of Astral Operations Limited  
Daybreak Farms  
Lufafa Hatchery Pty Ltd  
Ratan Agro Industries  
Five Feathers Food  
Ross Poultry Breeders, a Division of Astral Operations  
Country Bird Holdings  
National Chicks a Division of Astral Operations Ltd  
A A Quality Chickens  
Raseto Agricultural Enterprise cc  
Grootvlei Kuikens  
Karoo Hatchery

Grain Field Chickens Pty Ltd  
Ducko Processing cc  
Mountain Valley a Division of Astral Operations  
Eagles Pride Hatchery Pty Ltd  
Red Farms Agripark Pty Ltd

### SAPA contract farmers include:

Ikutana  
KwaMhlanga Poultry  
List Cleaning Chemicals  
Mo-Chicks  
Outcome Prop. 27 CC Site 1  
Outcome Prop 27 CC Site 2  
Sdudla Chicks (Pty) Ltd Site 1  
Sdudla Chicks (Pty) Ltd Site 2  
Sdudla Chicks (Pty) Ltd Site 3  
Sebenzani (Sinamuva)  
Sefala Logistics  
Poultry Harvest 1  
Poultry Harvest 2  
Rietvallei 1  
Rietvallei 2  
Klipspruit 1  
Klipspruit 2  
Gro Africa Farming  
For Real Chicks 1  
For Real Chicks 2  
Freecka Landgoed  
Modderbult Boerdery 1  
Modderbult Boerdery 2  
Noycedale  
Poortjie  
Shalev 1  
Shalev 2  
Sintier Poultry  
Tulipvale  
Kwena Chicks  
Raseto  
Selame  
Prime Trade  
Al Najam  
Peabro  
Makhalempongo Chicken (Pty) Ltd  
Essaurinca Farms 1 B105  
Essaurinca Farms 2 B106  
Impro Chickens  
De Goedehoop  
Siyankulisa  
Sunrays Farming Enterprise  
JR Ngwenya  
Marnad Eiendomme (Pty) Ltd  
Zenzeleni Cleaning and Transport  
Pax Agricultural Primary

Veritas Agri  
Izindonga Ze-Africa Trading  
Matholwana 747 (Pty) Ltd  
Ubuhle Siyazenzela

**AMIE members and associate members:**

Assign Trading  
Federated Meats  
Dee Imports  
QK Meats  
Excellent Meats  
BRM Manufactures  
Federated Meats  
Freddy Hirsch Group  
Shoprite Head Office  
Bidvest Foodservice  
Roots Cold Storage  
DC Meat  
Woolworths  
Gluckmann Family Trust  
BMS Select Foods  
Deepcatch Trading  
Shoprite Checkers  
Britos Food International  
Weddel Swift SA  
BRF Foods Africa  
BJK Industries  
Marios Meats  
Profood Africa  
New Style Pork  
Vion Foods  
CP Intertrade  
Enduro Trading  
Merlog Food  
Mkabayi Group  
Frey's Food Brands  
Kintetsu express  
Tomex  
Master Good Hungary  
P J Impex Inc  
Iberdigest  
Swift Trade  
Bord Bia - Irish Food board  
Leadex SAS  
Lamex Foods Brazil  
Nowaco A/S  
SERA INT  
Lanex Co  
FEDECO  
Plukon  
ESS Food  
USA Meat Export Federation  
Mirasco

Bassett & Walker Int  
Tyson Int Inc Europe  
Sanger Australia  
Pro Food  
ABPA  
Dawn Meats  
FOB Trading  
Partners Network  
USA Poultry Council



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