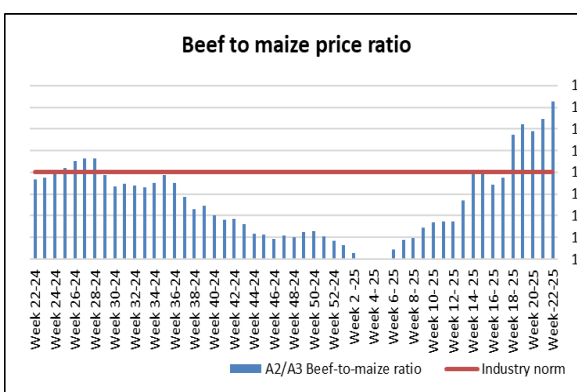
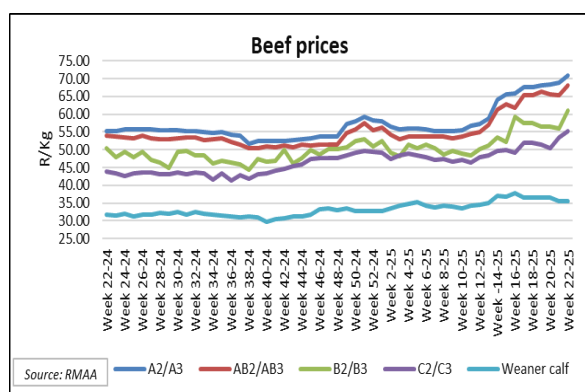




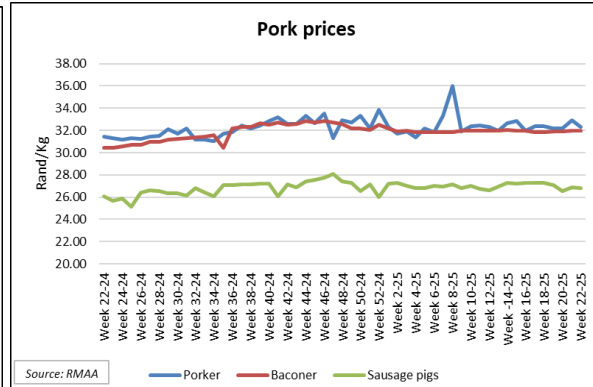
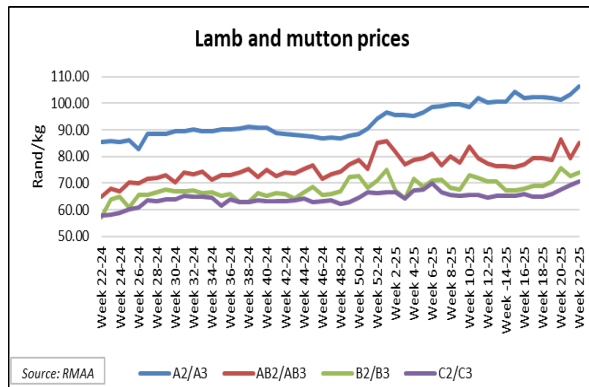
South Africa's biggest beef producer, Karan beef, confirmed a case of the foot and mouth disease (FMD) on 02 June 2025 at its Heidelberg feedlot. This consequently led to the temporary suspension of cattle intake at this facility. This is expected to cause a lot of uncertainty in the beef market. Based on the current indications and standard containment procedures, it is estimated that operations at the feedlot could be disrupted for about 60 to 90 days. The company expects this to reduce its beef production by more than 50%. This is expected to negatively affect beef supply in the country. It is also expected to have a negative impact on weaner producers, as this could decrease the demand for weaners and pressure prices. The outbreak poses a threat to the recovery that the industry had pencilled for 2025. The prices of both beef and lamb have been trending upwards since March 2025. The opening of international red meat markets, the modest 2025 economic growth forecast of 1.2%, lower interest rates, stable electricity supply, and receding feed prices had brought optimism. However, China has already banned beef imports from South Africa due to the FMD cases. In an effort to manage and contain the spread of the disease, it is of utmost importance for farmers to be aware of the origins of the animals they buy and to make sure that they only accept livestock from sources that have trustworthy health records. Additionally, it is essential for farmers to adhere to stringent biosecurity policies on their farms.

The beef industry



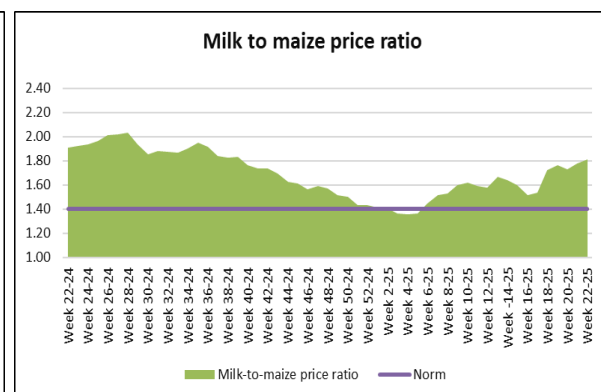
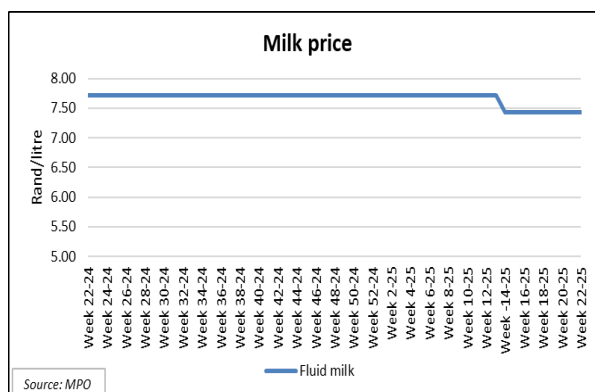
- **Beef prices** were bullish week-on-week (w/w).
- The average prices of class A2/A3 and AB2/AB3 increased by 2.9% and 4.5% w/w to R70.82/kg and R68.23/kg, respectively.
- The average prices of class B2/B3 and C2/C3 increased by 8.9% and 3.6% w/w to R61.00/kg and R55.26/kg, respectively.
- Average beef prices were 25.3% higher y/y on improved consumer demand.
- The average **weaner price** increased by 0.3% w/w to R35.62/kg due to improved demand for weaners on the market.
- In the past week, the average **beef-to-maize price ratio** increased by 5% w/w to 17.3 due a decrease of 2% w/w in the average yellow maize price.

The mutton and pork industries



- **Mutton and lamb prices** were bullish w/w.
- The average prices of class A2/A3 and AB2/AB3 increased by 2.9% and 7.2% w/w to R106.37/kg and R85.02/kg, respectively.
- The average prices of class B2/B3 and C2/C3 increased by 1.6% and 2% w/w to R73.97/kg and R70.56/kg, respectively.
- The average mutton and lamb prices were 26.8% higher y/y due to improved demand.
- **Pork prices** traded mixed w/w.
- The average price of porkers decreased by 1.9% w/w to R32.22/kg.
- The average prices of baconers increased by 0.1% w/w to R31.96/kg, while the price of sausage decreased w/w by 0.4% to R26.78/kg.
- On average, pork prices were 3.5% higher y/y.

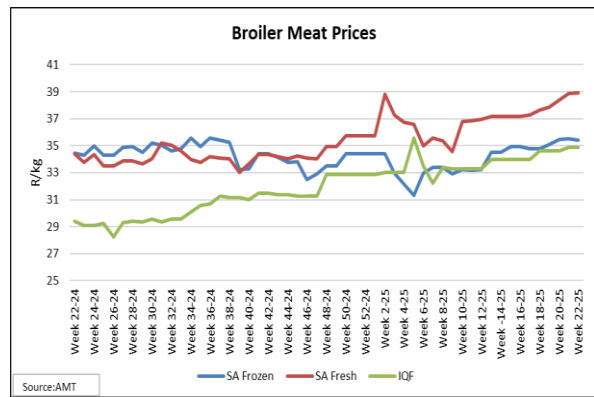
The dairy industry



- The latest average **milk producer price** set by dairy processors in April 2025 is estimated at R7.43/l.
- In the past week, the average **milk-to-maize price ratio** increased by 2% w/w to 1.81.
- The increase in the milk-to-maize price ratio was due to the 2% 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 mixed w/w.
- The average price of **South African frozen chicken** decreased by 0.3% w/w to R35.42/kg, while **fresh chicken** increased by 0.1% w/w to R38.91/kg.
- The average price of **IQF chicken** remained flat w/w at R34.87/kg.
- Average chicken prices were up by 11.48% on an annual basis.



The wool industry

Indicator	SA prices (R/kg)		Change
	Previous	Current	
Clean non-RWS certified wool	173.35	173.80	↑ 0.3%
Clean RWS certified wool	177.22	177.32	↑ 0.1%

- The latest **wool auction** took place on 04 June 2025, with 7 209 bales of wool on offer and 516 bales being withdrawn prior to the sale.
- Sustainable certified merino wools accounted for 60.3% of the total wool on offer.
- Approximately 95.2% 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 0.1% to R173.80/kg and R177.32/kg, respectively.
- The next wool auction is expected to take place on 11 June 2025 with approximately 11 862 bales going on offer.

Mohair industry

Commodity	Rand/kg			Change from previous	Change (y/y)
	Last year	Previous	Current		
Mohair					
Kids	669.37	697.44	711.06	↑ 2.0%	↑ 6.2%
Young Goats	375.18	333.03	333.69	↑ 0.2%	↓ -11.1%
Adults:					
- Fine	348.60	299.40	299.36	↓ 0.0%	↓ -14.1%
- Strong	313.94	284.05	285.88	↑ 0.6%	↓ -9.5%

- The sixth **mohair sale** of the 2025 summer season took place on 27 May 2025, with 155 555 kg of mohair on offer.
- Approximately 93% of mohair that was offered was sold during the sale.
- About 84% of the mohair that was offered during the sale was **RMS** (Responsible Mohair Standard) certified.
- The rand traded stronger against the dollar resulting in only a 1% increase in the average market indicator compared to the previous sale.
- The average prices of **kid mohair** increased by 2%, while **young goat mohair** remained unchanged compared to the previous sale.
- Average prices of **adult fine mohair** remained unchanged, while **adult strong mohair** increased by 0.6% compared to the previous sale.
- The next mohair sale of the 2025 summer season is expected to take place on 10 June 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.

Trade map.

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