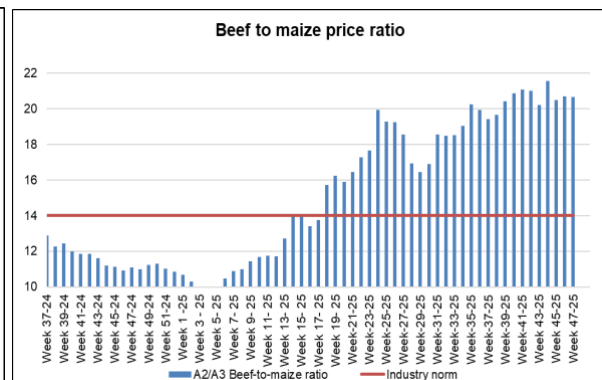
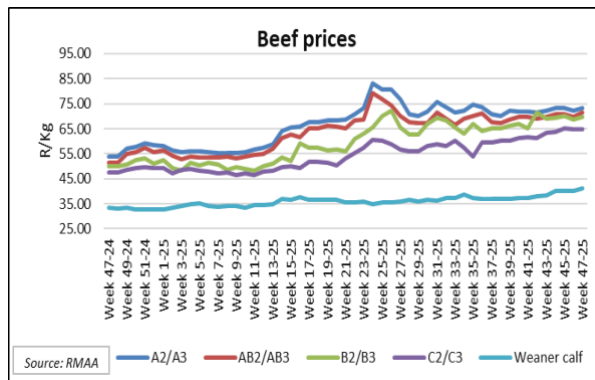




Summary

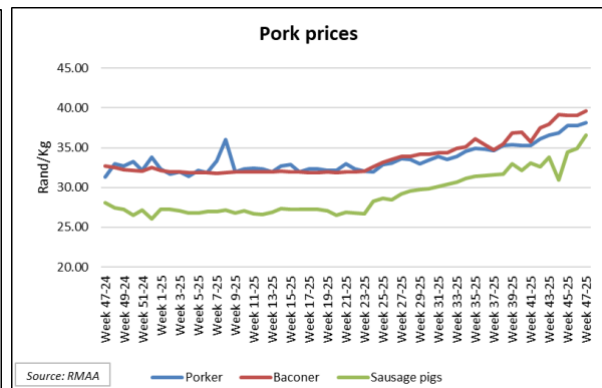
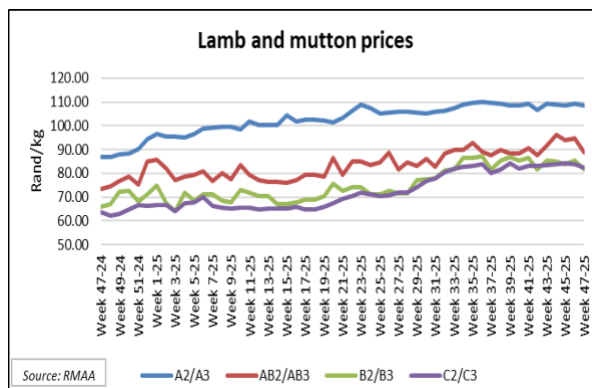
A new case of rift valley fever (RVF) in sheep has been reported in the Northern Cape. RVF is a viral disease that often leads to miscarriages and high mortality rates. To prevent further spread of the disease, Red Meat Industry Services (RMIS) has engaged Onderstepoort Biological Products (OBP) to determine the current vaccine stock levels and assist in coordinating the allocation of available vaccines to high-risk areas. RMIS is also working closely with the local veterinary authorities of the Northern Cape to monitor the situation and ensure that all necessary biosecurity measures are enforced to protect the animals and support affected farmers. The National Institute for Communicable Diseases (NICD) has indicated that there have been several isolated outbreaks of the disease in the country in the past. A widespread outbreak of the disease was last reported in 2010/11. During this period, RVF epidemics followed periods of heavy rainfall and localised flooding, which led to the spread of the virus. The disease can be spread by infected animal, usually through contact with blood or body fluids of infected animals or by bites from the mosquito vector. Farmers are advised to remain vigilant and adhere to strict biosecurity practices.

The beef industry



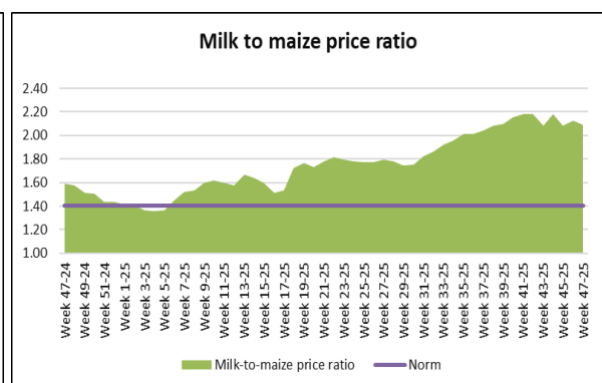
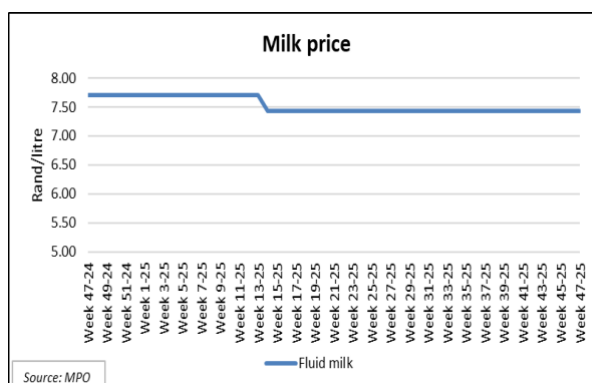
- **Beef prices** were largely bullish week-on-week (w/w).
- The average prices of class A2/A3 and AB2/AB3 increased by 1.6% and 2.9% w/w to R73.44/kg and R71.60/kg, respectively.
- The average price of class B2/B3 increased by 1.3% w/w to R69.68/kg, while class C3/C3 remained flat at R64.93/kg.
- Average beef prices were 37.7% higher y/y on tighter availability of beef on the local market.
- The average **weaner price** increased by 1.8% w/w to R41.06/kg due to improved demand for weaners on the market.
- In the past week, the average **beef-to-maize price ratio** went down by 0.2% w/w to 20.6 due to a 1.8% w/w increase in the average yellow maize price.

The mutton and pork industries



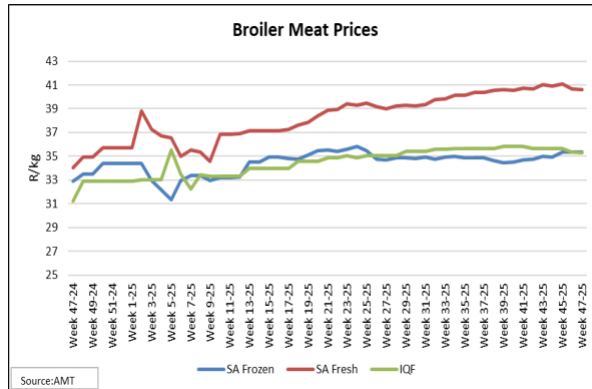
- **Mutton and lamb prices** were bearish w/w.
- The average prices of class A2/A3 and AB2/AB3 decreased by 0.5% and 6.2% w/w to R108.66/kg and R88.81/kg, respectively.
- The average prices of class B2/B3 and C2/C3 decreased by 4.1% and 1.5% w/w to R81.80/kg and R82.50/kg, respectively.
- The average mutton and lamb prices were 25% higher y/y due to tighter local supply.
- **Pork prices** were bullish w/w.
- The average price of porkers increased by 1.9% w/w to R38.15/kg.
- The average prices of baconers and sausage increased by 1.5% and 4.8% w/w to R39.66/kg and R36.62/kg, respectively.
- On average, pork prices were 21.5% higher y/y as consumers continue to switch to pork from other higher priced red meat options.

The dairy industry



- The latest average **milk producer price** set by dairy processors is estimated at R7.43/l.
- In the past week, the average **milk-to-maize price ratio** decreased by 1.8% w/w to 2.1.
- The decrease in the milk-to-maize price ratio was also due to the 1.8% w/w increase in the average yellow maize price.
- The average milk-to-maize price ratio is fortunately still above its long-term average of 1.4.

The broiler industry



- **Broiler** prices were bearish w/w.
- The average price of **South African frozen chicken** and **fresh chicken** marginally decreased by 0.1% and 0.2% w/w to R35.33/kg and R40.62/kg, respectively.
- The average price of **IQF chicken** decreased by 0.1% w/w to R35.30/kg.
- Average chicken prices were up by 13.2% on an annual basis, supported by consumer demand.

The wool industry

Indicator	SA prices (R/kg)		Change
	Previous	Current	
Clean non-RWS certified wool	206.45	205.35	↓ -0.5%
Clean RWS certified wool	211.10	211.44	↑ 0.2%

- The latest **wool auction** took place on 26 November 2025, with 13 754 bales of wool on offer.
- The auction achieved an overall steady performance.
- Approximately 93.8% of the wool that was on offer was sold during the auction.
- Sustainable certified merino wools only accounted for 42% of the total merino wool that was on offer.
- Compared to the previous auction, the **non-RWS** (Responsible Wool Standard) decreased by 0.5% w/w to R205.35/kg, while the **RWS** increased by 0.2% to R211.44/kg.
- The next wool auction is expected to take place on 03 December 2025, with approximately 10 200 bales on offer.

Mohair industry

Commodity	Rand/kg			Change from previous	Change (y/y)
	Last year	Previous	Current		
Mohair					
Kids	603.64	610.15	622.04	↑ 1.9%	↑ 3.0%
Young Goats	317.10	342.48	345.63	↑ 0.9%	↑ 9.0%
Adults:					
- Fine	295.17	293.61	287.76	↓ -2.0%	↓ -0.5%
- Strong	265.36	260.72	255.64	↓ -1.9%	↓ -1.7%

- The sixth **mohair sale** of the 2025 winter season took place on 25 November 2025, with 123 155 kg of mohair on offer.
- Approximately 96% of the mohair that was offered was sold during the sale.
- The average market indicator remained unchanged compared to the previous sale at R362.91/kg.
- The average prices of **kid** and **young goat** mohair increased by 1.9% and 0.9% compared to the previous sale, respectively.
- Average prices of **adult fine** and **adult strong** mohair decreased by 2% and 1.9% compared to the previous sale, respectively.
- The final sale mohair sale of the 2025 winter season is expected to take place on 09 December 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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