

Animal Feed Report

JANUARY 2025

Report Released: April 2025

INTRODUCTION

Welcome to the AFMA Monthly Animal Feed Report for January 2025. This comprehensive report offers an in-depth analysis of the animal feed industry, highlighting key data and trends that illustrate the performance of feed products on both a month-over-month basis (January 2025 compared to December 2024) and a year-over-year basis (January 2025 compared to January 2024). In a constantly changing agricultural landscape, understanding the factors influencing animal feed performance is essential for stakeholders such as producers, nutritionists, and supply chain partners. This report focuses on critical metrics, including production volumes and market demand, while also exploring factors impacting these trends, such as feed ingredient availability, supply chain disruptions, transportation inefficiencies, logistical challenges, and more. As we begin 2025, this analysis offers valuable insights to help stakeholders navigate a complex market environment and make well-informed decisions.

In January 2025, the overall AFMA animal feed production experienced a reasonable decline of 2.4% compared to December 2024. This downturn was primarily driven by reduced outputs in beef and sheep feed, broiler feed, game feed, as well as specialty feeds for ostriches, dogs, and rabbits. The seasonal adjustment and market fluctuations during this period likely contributed to the decreased production levels across these categories. Despite this short-term drop, the sector remains resilient, reflecting adjustments in demand and supply chain dynamics as producers reset their operations for the upcoming months. On a broader annual basis, the total feed production in January 2025 showed a significant increase of 11.4% over January 2024, indicating a positive long-term growth trend within the industry. Notably, aquaculture feed was the only segment to experience a decline year-on-year, which may be attributed to industry-specific challenges or shifts in aquaculture practices. Overall, the data indicate a robust expansion in most animal feed categories, highlighting increased demand driven by expanding livestock populations and evolving agricultural strategies. This growth momentum suggests a favourable outlook for the animal feed sector, with opportunities for strategic investments and capacity enhancements to meet rising production needs.

Important note

The January 2025 AFMA official data is used in this report, as the release of April 2025 offers a comparative analysis of *January 2025 with January 2024 (year-on-year)* and *January 2025 with December 2024 (month-on-month)*

See link below from AFMA website

<https://www.afma.co.za/industry-statistics/>


TOTAL FEED SALES

577,217

January 2025

591,464

December 2024

-2.4% 

Month-on-Month
Difference (%)

-14,247

Month-on-Month
Difference (Tons)

577,217

January 2025

518,062

January 2024

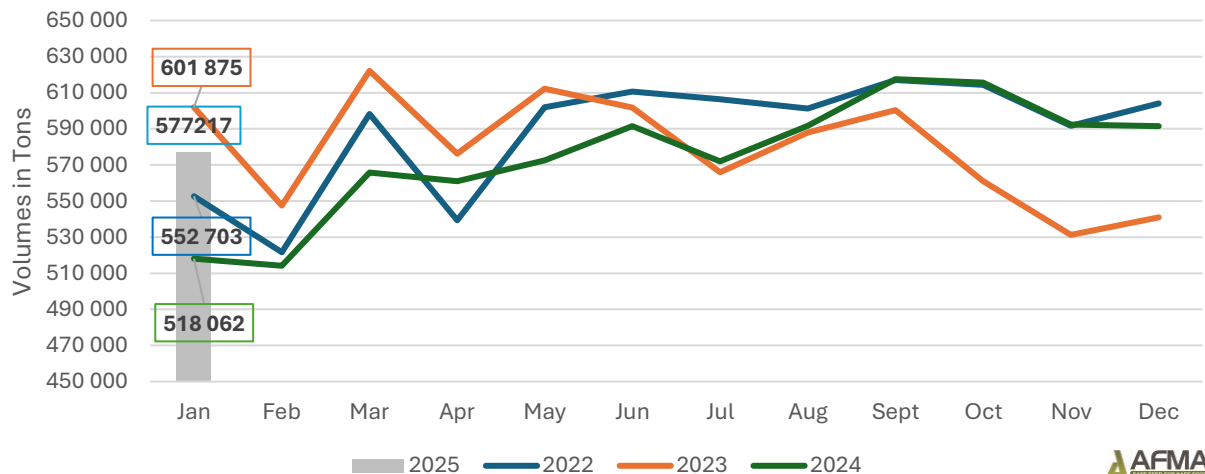
+11.4% 

Year-on-Year Difference
(%)

59,155

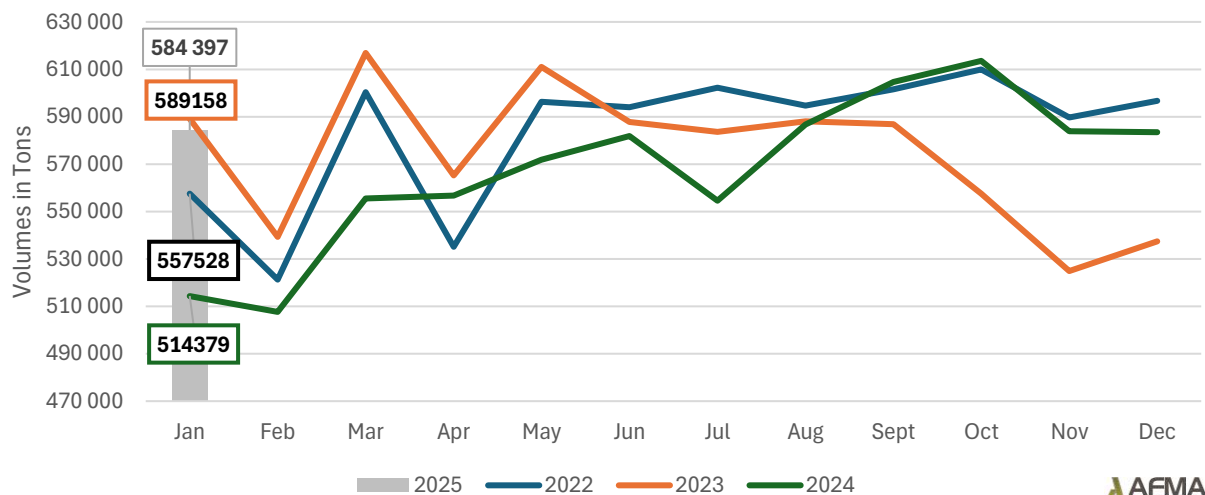
Year-on-Year Difference
(Tons)

Total Monthly Animal Feed Sales Trends



AFMA
Animal Feed Manufacturers Association

Total Monthly Raw Materials Usage Trends



AFMA
Animal Feed Manufacturers Association



DAIRY FEED

87,540

January 2025

86,645

December 2024

+1,0% 

Month-on-Month
Difference (%)

895

Month-on-Month
Difference (Tons)

87,540

January 2025

80,305

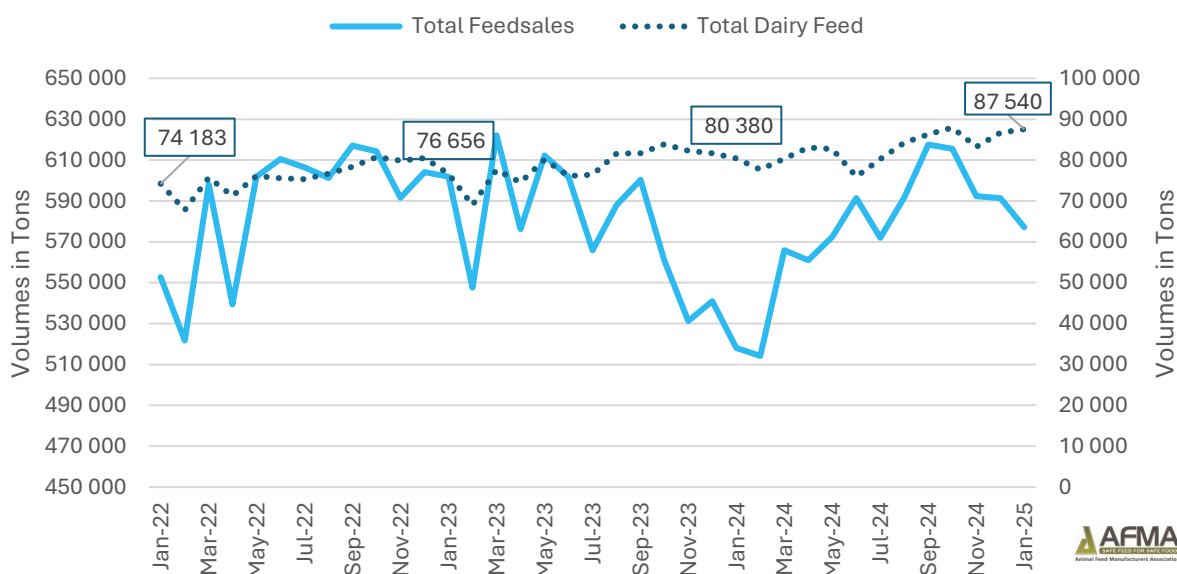
January 2024

+8,9% 

Year-on-Year Difference
(%)

7,235

Year-on-Year Difference
(Tons)



In January 2025, dairy feed production experienced a modest month-over-month increase of 1% compared to December 2024, reflecting steady demand amid seasonal variations. On a year-over-year basis, production surged by 8.9% when compared to January 2024, indicating a significant expansion in dairy cattle feed demand. This upward trend may be attributed to an increase in dairy cattle populations and higher feed consumption per animal, driven by growth in dairy farm operations and improved productivity initiatives. Overall, the data suggests a positive outlook for the dairy sector, supported by expanding herd sizes and sustained feed requirements. According to USDA (2025), South Africa's dairy industry is likely to grow in the future due to improving economic factors, despite suffering from many weather and disease related challenges in the past five years. In 2025, FAS/Pretoria forecasts unprocessed liquid milk production to increase by 2% on declining feed costs.



BEEF & SHEEP FEED

52,979

January 2025

61,259

December 2024

-13,5%



Month-on-Month
Difference (%)

-8,280

Month-on-Month
Difference (Tons)

52,979

January 2025

48,669

January 2024

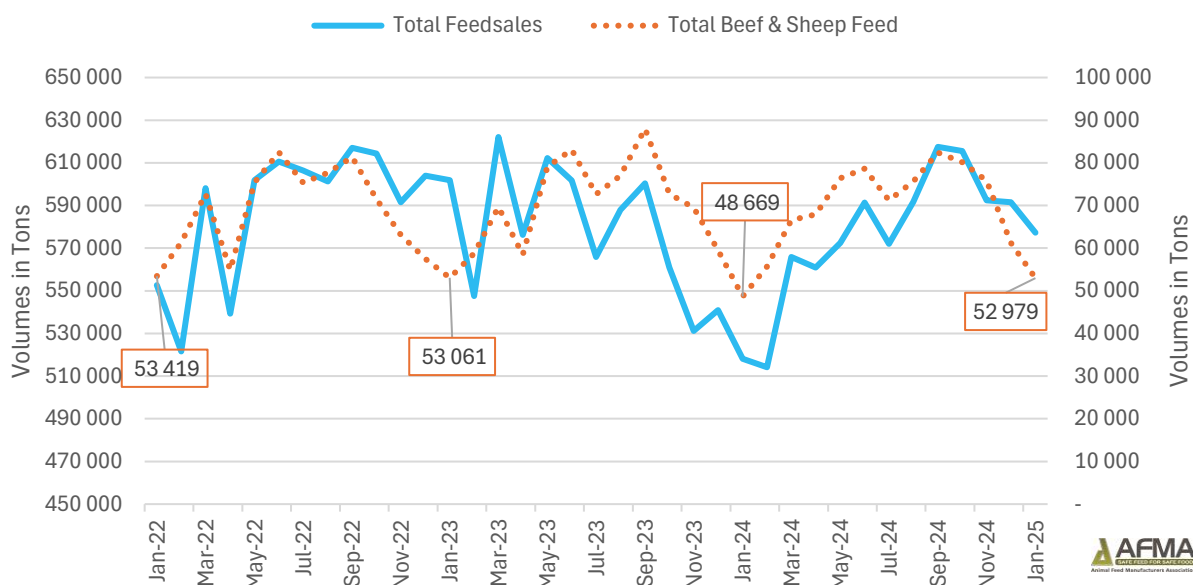
+8,9%



Year-on-Year Difference
(%)

4,310

Year-on-Year Difference
(Tons)



In January 2025, beef and sheep feed production experienced a 13.5% decrease compared to December 2024, reflecting a significant short-term decline. However, when comparing January 2025 to the same month in the previous year, production increased by 8.9%, indicating a positive annual growth trend. This fluctuation may be closely linked to variations in livestock feed consumption and changes in the cattle and sheep populations across South Africa. The year-on-year increase suggests a potential recovery or expansion in livestock numbers or feed demand, while the month-to-month decline could be attributed to seasonal factors, adjustments in feed inventory, or short-term market dynamics. Continued monitoring of livestock demographics and consumption patterns will provide further insights into these production trends. The anticipated growth may be influenced by disease outbreaks, such as foot and mouth disease (FMD), as evidenced in KwaZulu-Natal Province, where the virus remains present. This ongoing presence could potentially impact the demand for beef feed.



PIG FEED

40,673

January 2025

38,592

December 2024

+5,4% ↑

Month-on-Month
Difference (%)

2,081

Month-on-Month
Difference (Tons)

40,673

January 2025

38,210

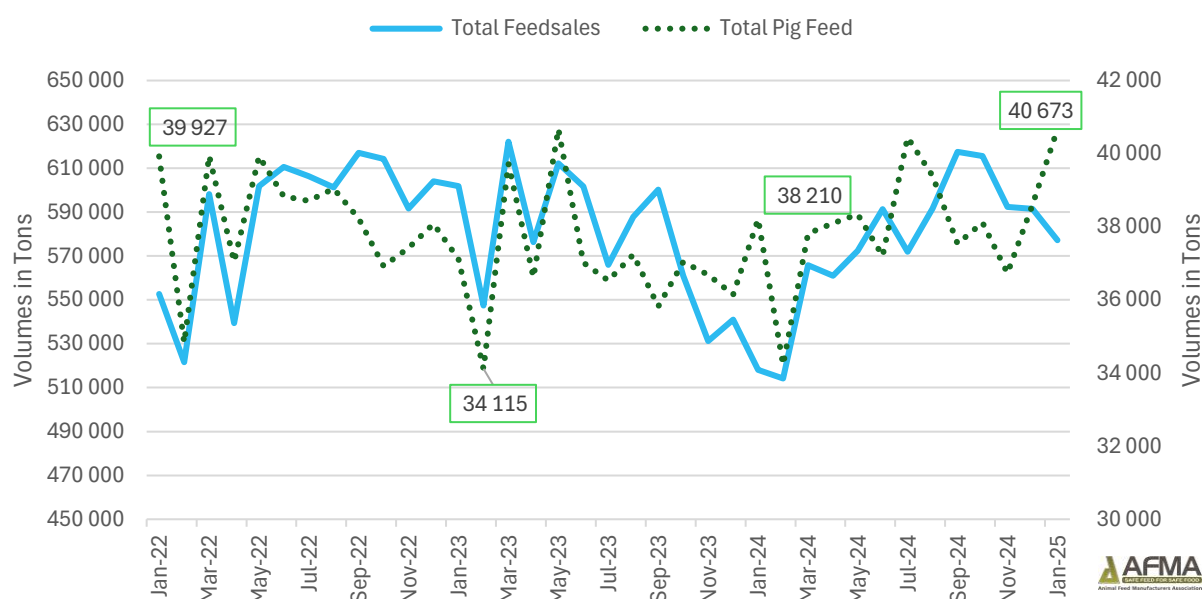
January 2024

+6,4% ↑

Year-on-Year
Difference (%)

2,463

Year-on-Year Difference
(Tons)



The South African weighted average feed price reached R5,686/t in January 2025, 10,1% lower than in December 2024 and 8,2% higher than in January 2024. Yellow maize prices were 6,9% higher in January 2025 compared to December 2024 and 52,6% higher compared to January 2024. In January 2025, the producer price-to-feed price ratio reached 5,6 (SAPPO, 2025). In January 2025, AFMA pig feed production saw a significant rise of 5.4% compared to December 2024, demonstrating consistent month-to-month growth. On an annual basis, production increased by 6.4% compared to January 2024, indicating ongoing expansion in the pig feed industry. This upward trajectory may be linked to higher pig feed consumption driven by an increase in South Africa's pig population, possibly supported by the recent recovery of the livestock sector. Furthermore, although a recent disease outbreak initially posed challenges. Overall, these developments point to a positive outlook for the pig feed market, driven by rising demand and proactive measures to address sector challenges.



LAYER FEED

78,093

January 2025

72,469

December 2024

+7,8% 

Month-on-Month
Difference (%)

5,624

Month-on-Month
Difference (Tons)

78,093

January 2025

60,007

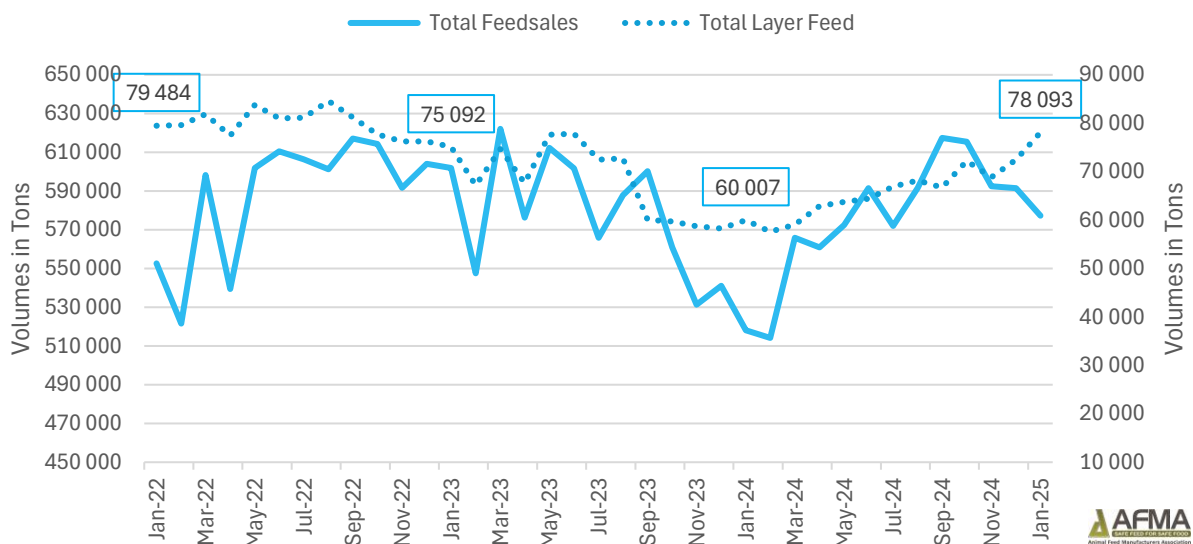
January 2024

+30,1% 

Year-on-Year Difference
(%)

18,086

Year-on-Year
Difference (Tons)



According to the SAPA report, the usage of breeder laying feed has shown a steady upward trend, increasing by 0.8% month on month from January 2025 through December 2025. Additionally, there has been a significant year-on-year growth of 21% when comparing January 2025 to January 2024. This consistent rise indicates a growing demand for breeder laying feed, reflecting expanded production activities or increased poultry management practices in the period. In January 2025, AFMA layer feed production experienced a notable increase of 7.8% compared to December 2024, reflecting an immediate uptick in demand and supply adjustments. On an annual basis, sales also surged by 30.1% when comparing January 2025 to January 2024, indicating a strong upward trend in layer feed output. This significant year-on-year growth may be attributed to the industry's efforts to recover from the recent disease outbreak, which likely prompted increased focus on layer health and productivity. The rebound in feed production underscores the sector's resilience and the strategic measures implemented to restore confidence and meet the growing poultry sector needs post-outbreak.



BROILER FEED

250,394

January 2025

264,540

December 2024

-5,3% 

Month-on-Month
Difference (%)

-14,146

Month-on-Month
Difference (Tons)

250,394

January 2025

231,349

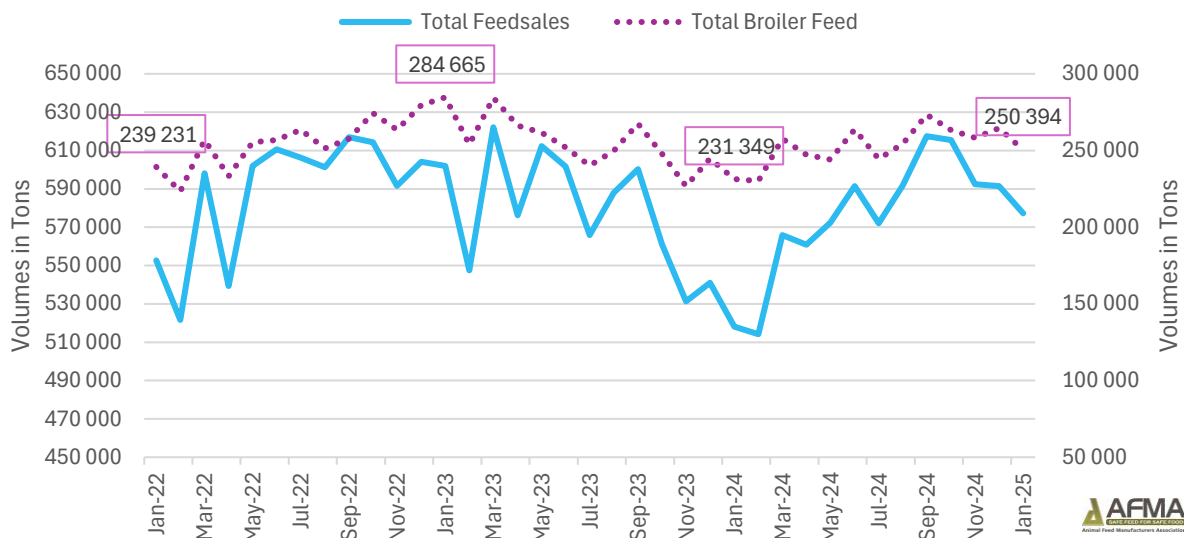
January 2024

+8,2% 

Year-on-Year Difference
(%)

19,045

Year-on-Year
Difference (Tons)



According to the SAPA report, broiler feed usage is projected to increase steadily by 5% month-on-month from January 2025 through December 2025, indicating a consistent rise in demand throughout the year. However, when comparing the year-on-year data, there is a slight decrease of 0.6% in broiler feed consumption from January 2024 to January 2025. This suggests that despite the monthly growth within 2025, the overall annual usage slightly declined compared to the previous year. In January 2025, AFMA broiler feed production experienced a month-over-month decrease of 5.3% compared to December 2024, reflecting a seasonal adjustment or supply chain variations. However, when comparing January 2025 to the same month in the previous year, production increased by 8.2%, indicating a positive year-on-year growth trend. This growth aligns with SAPA's recent analysis, which attributes the overall increase in broiler feed usage to expanding poultry farm capacities and improved feed conversion efficiencies. The combined data suggests that, despite short-term fluctuations, the broiler feed market remains resilient and is expected to continue its upward trajectory driven by industry demand and strategic feed utilization.



BREEDER FEED

51,693

January 2025

50,333

December 2024

+2,7% ↑

Month-on-Month
Difference (%)

1,360

Month-on-Month
Difference (Tons)

51,693

January 2025

44,486

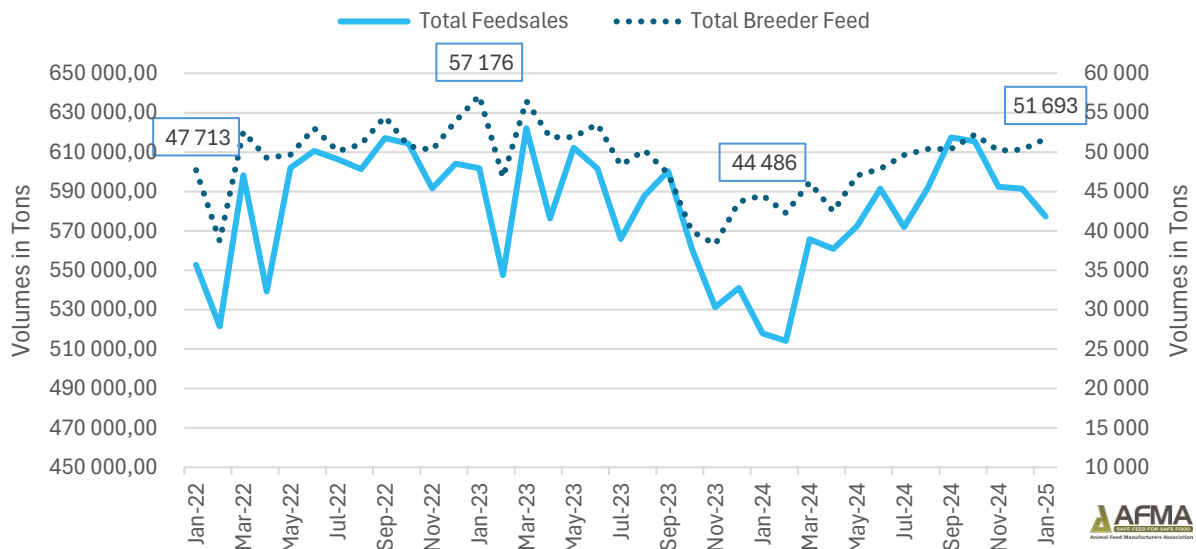
January 2024

+16,2% ↑

Year-on-Year Difference
(%)

7,207

Year-on-Year Difference
(Tons)



According to the SAPA analysis, the usage of breeder rearing feed experienced a month-on-month decline of 1.3% from January 2025 to December 2024. Additionally, there was a year-on-year decrease of 3.5% when comparing January 2025 to January 2024. These trends indicate a consistent reduction in breeder rearing feed consumption over both short-term and longer-term periods. On the other hand, in January 2025, AFMA breeder feed sales experienced a month-over-month increase of 2.7% compared to December 2024, indicating a modest uptick in production activity. However, when examining the year-over-year comparison, sales has surged by 16.1% relative to January 2024, reflecting a significant growth trend in breeder feed output. Notably, this increase contrasts with SAPA's reported figures for breeder rearing feed usage during the same period, which suggest a different consumption pattern. This divergence highlights potential discrepancies between sales data and actual feed utilization, underscoring the need for further analysis to align supply with demand and ensure accurate forecasting in the breeder feed segment.



HORSE FEED

2,078

January 2025

1,726

December 2024

+20,4% 

Month-on-Month
Difference (%)

352

Month-on-Month
Difference (Tons)

2,078

January 2025

1,564

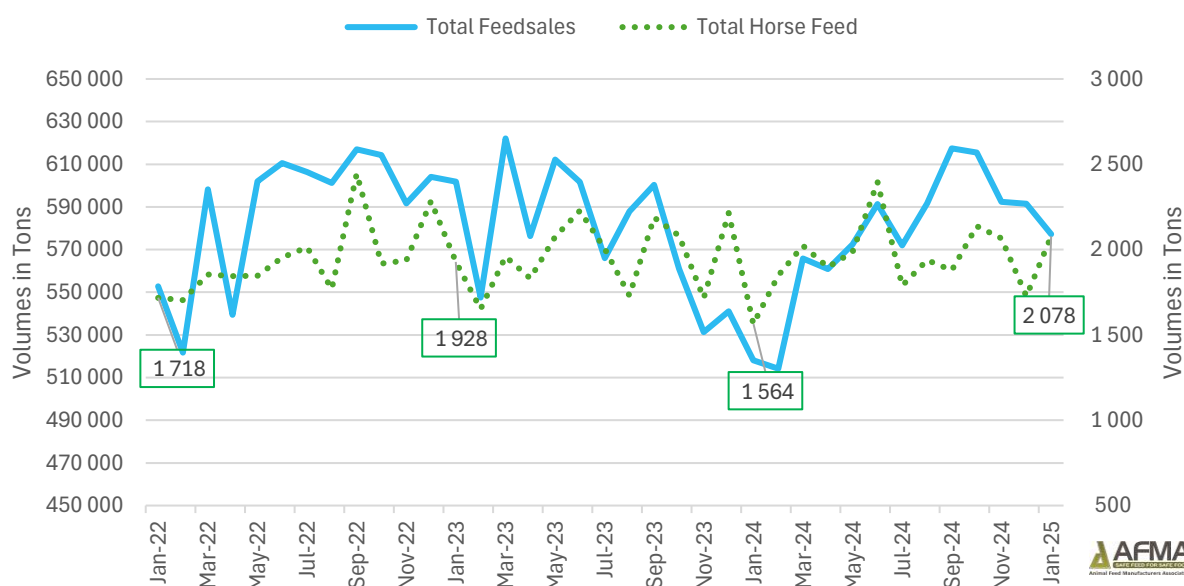
January 2024

+32,9% 

Year-on-Year Difference
(%)

514

Year-on-Year Difference
(Tons)



The global horse feed market is expected to continue growing due to increased awareness of equine nutrition, technological advancements, and factors like rising demand for horse meat and consumer income. In January 2025, horse feed production experienced a notable month-over-month increase of 20.4% compared to December 2024, reflecting a seasonal surge in demand as the industry prepares for the upcoming riding and competition seasons. Year-over-year, production has surged by 32.9% when compared to January 2024, indicating a significant upward trend in horse feed consumption over the past year. This substantial growth suggests heightened activity within the equine sector, potentially driven by increased horse ownership, expanding equestrian events, and a broader shift towards premium and specialized feed products. The pattern underscores a robust and expanding market, highlighting the importance of aligning production capacities with rising consumer demand to ensure supply stability and capitalize on the sector's growth trajectory.



GAME FEED

1,925
January 2025

2,395
December 2024

-19,6%
Month-on-Month
Difference (%)

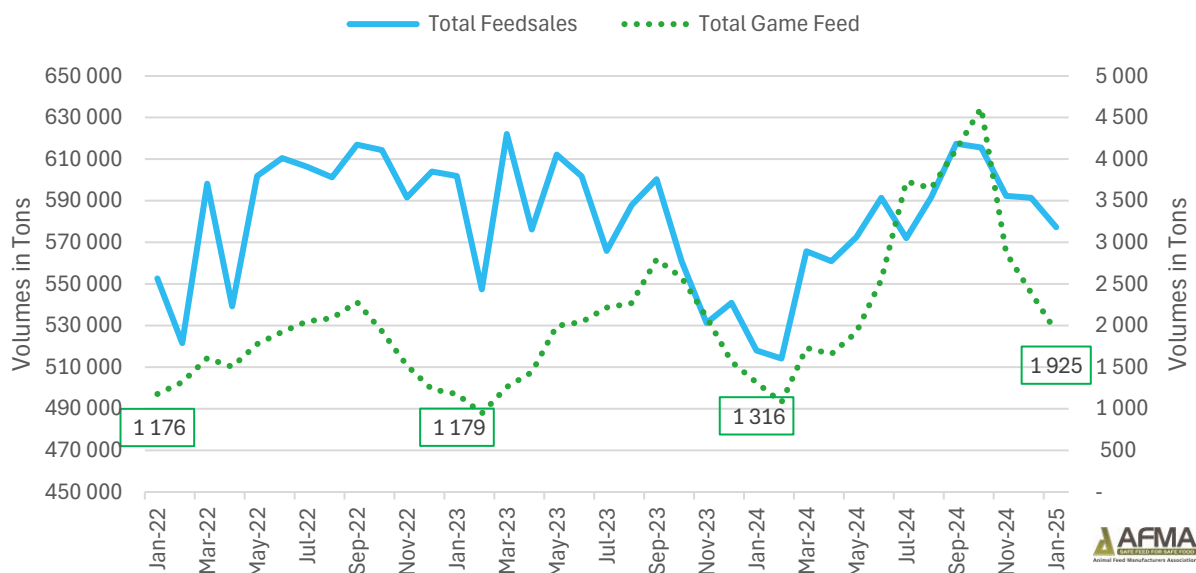
-470
Month-on-Month
Difference (Tons)

1,925
January 2025

1,316
January 2024

+46,3%
Year-on-Year
Difference (%)

609
Year-on-Year
Difference (Tons)




Currently, game meat contributes R9.1 billion a year (0.27%) to the GDP of South Africa. This has great potential to increase exponentially as the game meat industry grows. In January 2025, the production of game feed experienced a significant month-over-month decline of 19.6% relative to December 2024, indicating a temporary reduction in manufacturing activity likely attributable to seasonal variations or adjustments within the supply chain. Nonetheless, a year-over-year comparison demonstrates a substantial increase of 46.3% in game feed production when contrasting January 2025 with January 2024. This substantial growth signifies a strong upward trend in demand and consumption over the past year. The observed pattern suggests that, despite monthly fluctuations, overall consumption trends are favourably evolving, potentially driven by increased interest in game hunting, wildlife management initiatives, or expansion within game farm operations. The continued year-over-year growth highlights a resilient market environment and underscores the necessity of aligning production strategies with the rising demand for game feed.



AQUACULTURE FEED

606
January 2025


559
December 2024

+8,4% 
Month-on-Month
Difference (%)

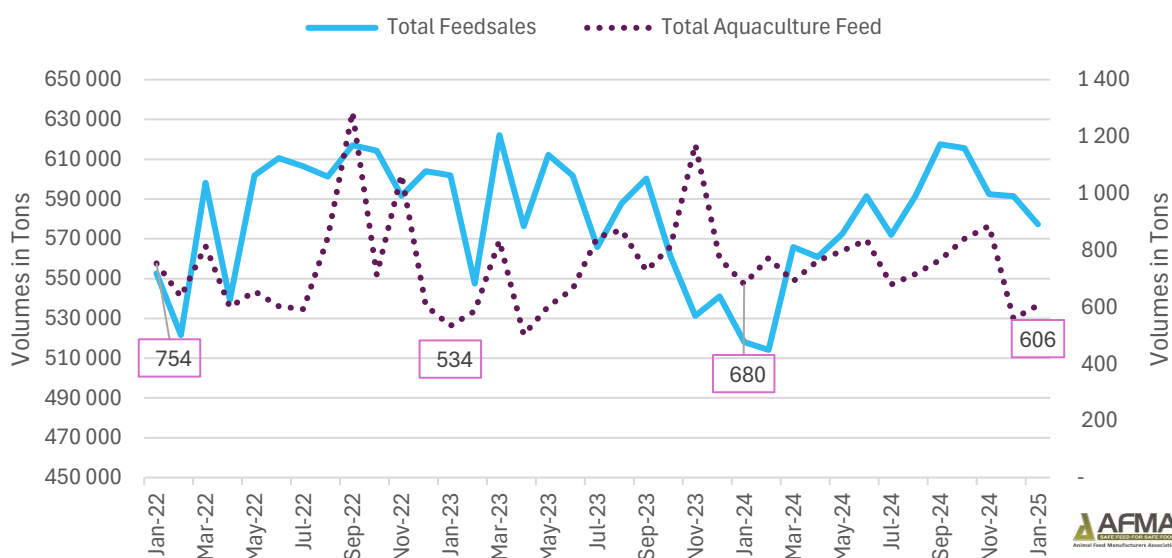
47
Month-on-Month
Difference (Tons)

606
January 2025

680
January 2024

-10,9% 
Year-on-Year Difference
(%)

-74
Year-on-Year Difference
(Tons)



Global feed production for the aquaculture sector declined slightly (by 1.1%), continuing a downward trend for the sector that first emerged in 2023. Unfortunately, the considerable decreases in Asia-Pacific and North America due to disease challenges, extreme weather events, cost pressures, and low market prices weighed down the entire sector. In January 2025, AFMA aquaculture feed sales experienced an 8.4% month-over-month increase compared to December 2024, indicating a recent resurgence in demand driven by seasonal factors and expanding aquaculture operations. However, when comparing January 2025 to the same month in the previous year, production has decreased by 10.9%, reflecting a broader decline in annual consumption patterns. This downward trend is potentially due to factors such as market saturation, feed price fluctuations, or shifts in aquaculture productivity. These patterns highlight the need for industry stakeholders to closely monitor demand cycles and adapt supply strategies accordingly to ensure sustainable growth in aquaculture feed utilization.



OSTRICH FEED

1,703
January 2025

2,024
December 2024

-15,9%
Month-on-Month
Difference (%)

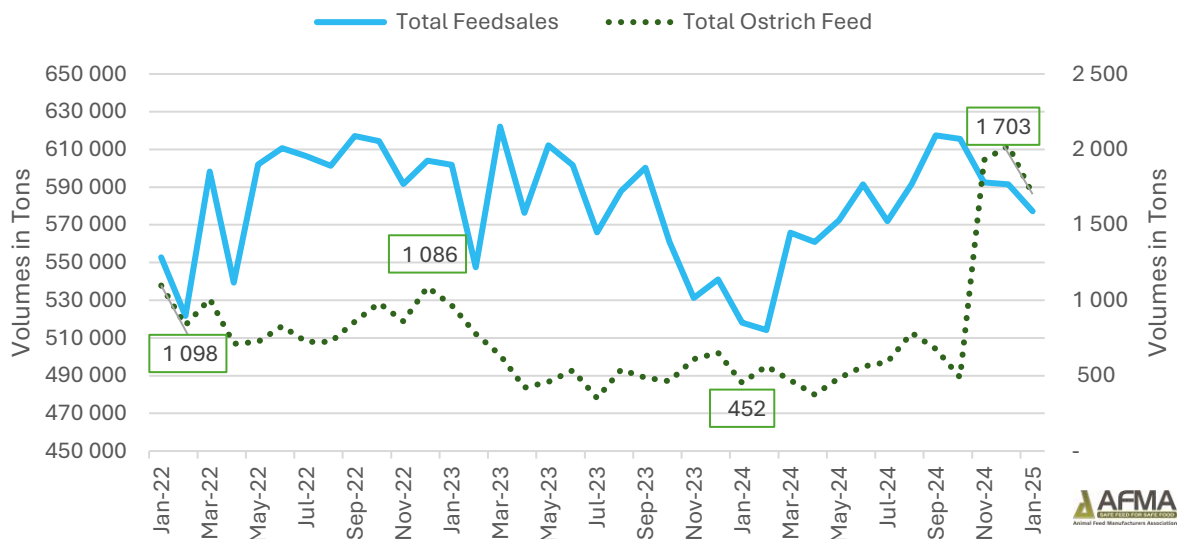
-321
Month-on-Month
Difference (Tons)

1,703
January 2025

452
January 2024

+276,8%
Year-on-Year
Difference (%)

1,251
Year-on-Year
Difference (Tons)



EU market is reopening for South African ostrich meat after a one-year ban, potentially easing pressure on the sector. The meat market is also experiencing growth on a global scale, with the global meat products market projected to increase. In January 2025, ostrich feed sales experienced a notable decrease of 15.9% compared to December 2024, indicating a short-term decline likely influenced by seasonal demand fluctuations or supply chain adjustments. Despite this month-to-month variation, the year-on-year comparison reveals a substantial growth of 276.8% when comparing January 2025 with January 2024, highlighting a significant upward trend in ostrich feed consumption over the past year. This dramatic increase suggests burgeoning interest in ostrich farming or expanding operations in the region, driving higher feed requirements. The overall consumption pattern underscores a robust and expanding market for ostrich feed, with the sharp annual growth reflecting increased adoption or investment in ostrich husbandry, while the recent monthly dip may indicate short-term logistical or demand-side factors.



DOG FEED

230

January 2025

264

December 2024

-12,9% ↓

Month-on-Month
Difference (%)

-34

Month-on-Month
Difference (Tons)

230

January 2025

186

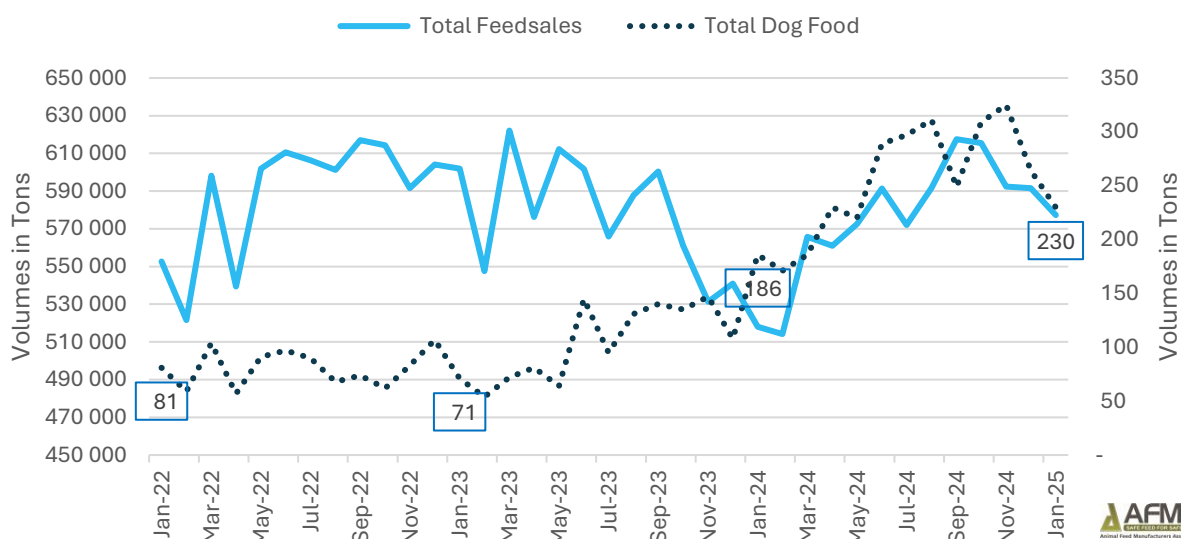
January 2024

+23,7% ↑

Year-on-Year
Difference (%)

44

Year-on-Year
Difference (Tons)



Pet feed tonnage soared 4.5% globally, fueled by continued trends toward premiumization (including functional diets and the “humanization” of pets), expanded pet ownership, and continued innovation in the sectors product offerings. In January 2025, dog feed production experienced a month-over-month decline of 12.9% compared to December 2024, indicating a short-term reduction in manufacturing output. However, on an annual basis, sales has shown a significant increase of 23.7% when compared to January 2024, reflecting a robust long-term growth trend in demand. This pattern suggests that while production may have temporarily slowed at the start of the year, potentially due to seasonal inventory adjustments or supply chain factors, overall consumption of dog feed has continued to rise substantially year-on-year. The consistent growth in consumption highlights a sustained demand for premium and mass-market dog feed products, underscoring a growing pet ownership trend and increasing consumer willingness to invest in pet nutrition.



RABBIT FEED

75

January 2025

76

December 2024

-1,3%



Month-on-Month
Difference (%)

-1

Month-on-Month
Difference (Tons)

75

January 2025

57

January 2024

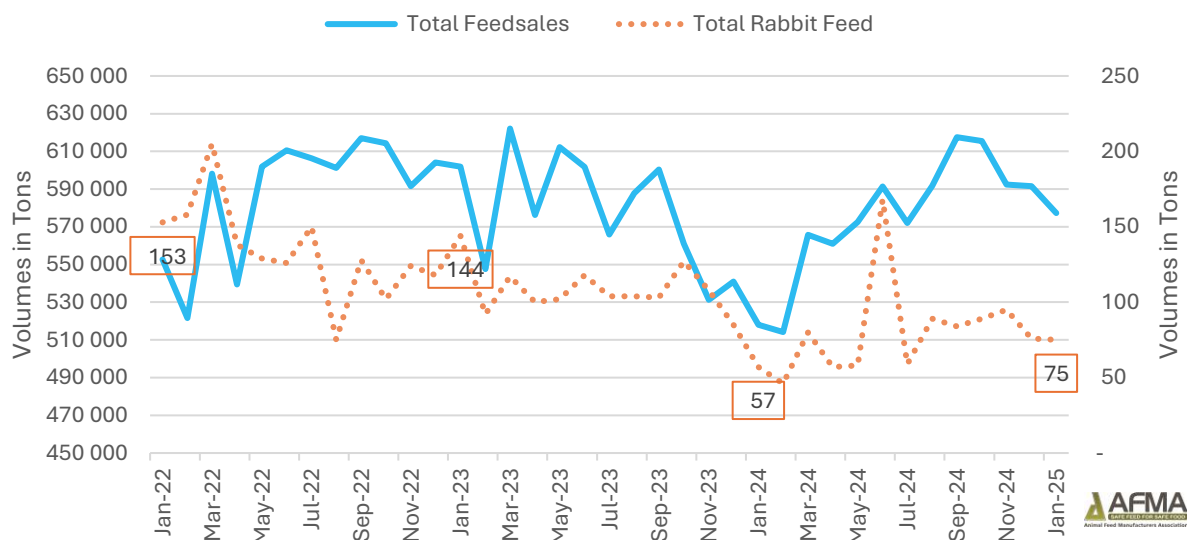
+31,6%



Year-on-Year Difference
(%)

18

Year-on-Year Difference
(Tons)



The global rabbit meat market is expected to witness significant growth in the coming years. According to a report by Research and Markets, the market is projected to reach a value of \$1.2 billion by 2025. One of the key drivers of this growth is the increasing awareness about the health benefits of rabbit meat. In January 2025, rabbit feed sales experienced a marginal decrease of 1.3% compared to December 2024, indicating a slight month-over-month decline possibly attributable to seasonal variations or supply chain adjustments. However, when viewed on a year-over-year basis, sales has significantly increased by 31.6% compared to January 2024, reflecting robust growth in rabbit farming activities and rising demand for rabbit feed. Consumption patterns suggest a steady upward trend in rabbit feed utilization, with January 2025 consumption figures surpassing previous years' levels, likely driven by increased adoption of rabbit farming as a sustainable protein source. This pattern underscores a growing market confidence and expanding rabbit farming operations, emphasizing the importance of aligning supply chain strategies to accommodate sustained demand fluctuations in the upcoming months.



OTHER FEED

1,192

January 2025

1,033

December 2024

+15,4% ↑

Month-on-Month
Difference (%)

159

Month-on-Month
Difference (Tons)

1,192

January 2025

912

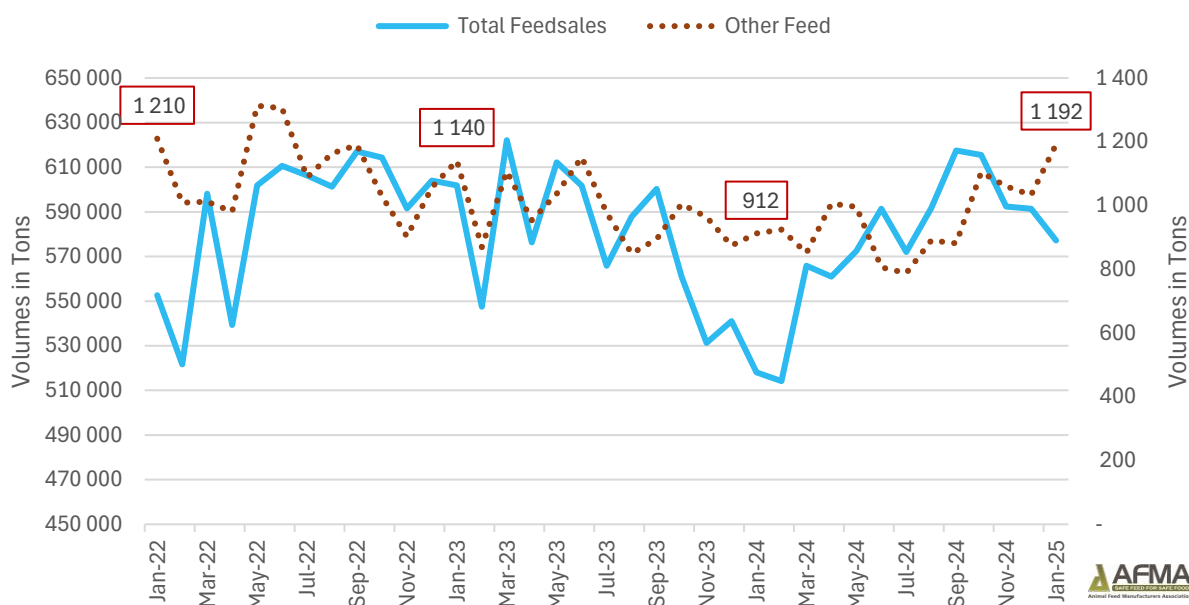
January 2024

+30,7% ↑

Year-on-Year Difference
(%)

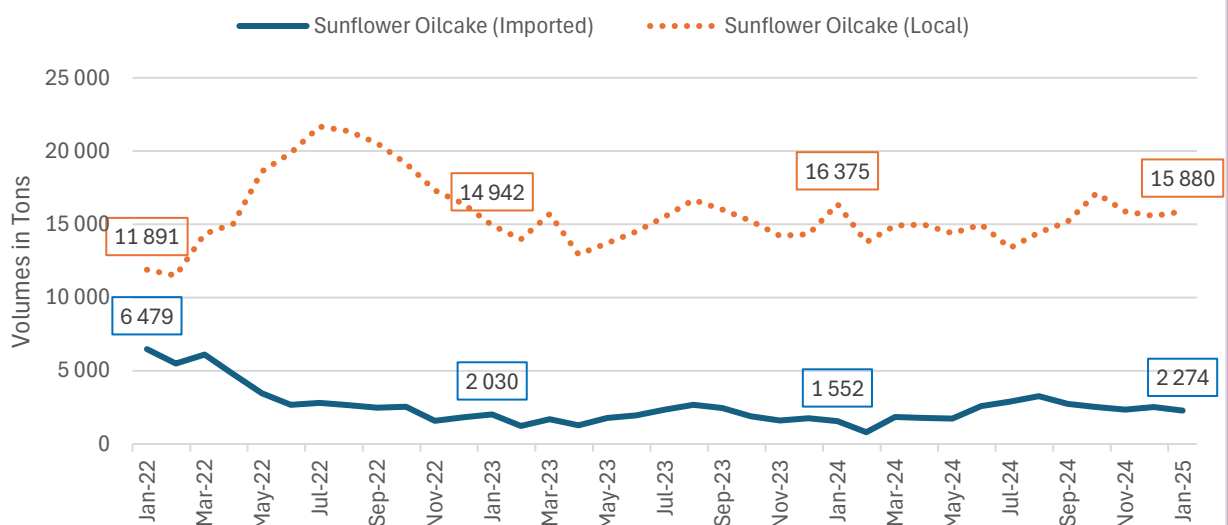
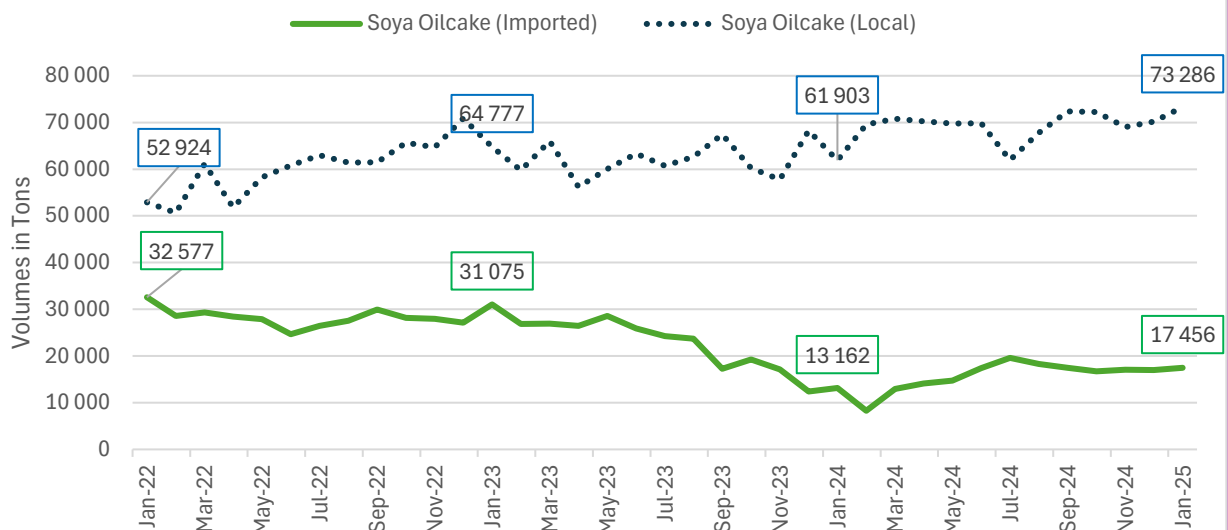
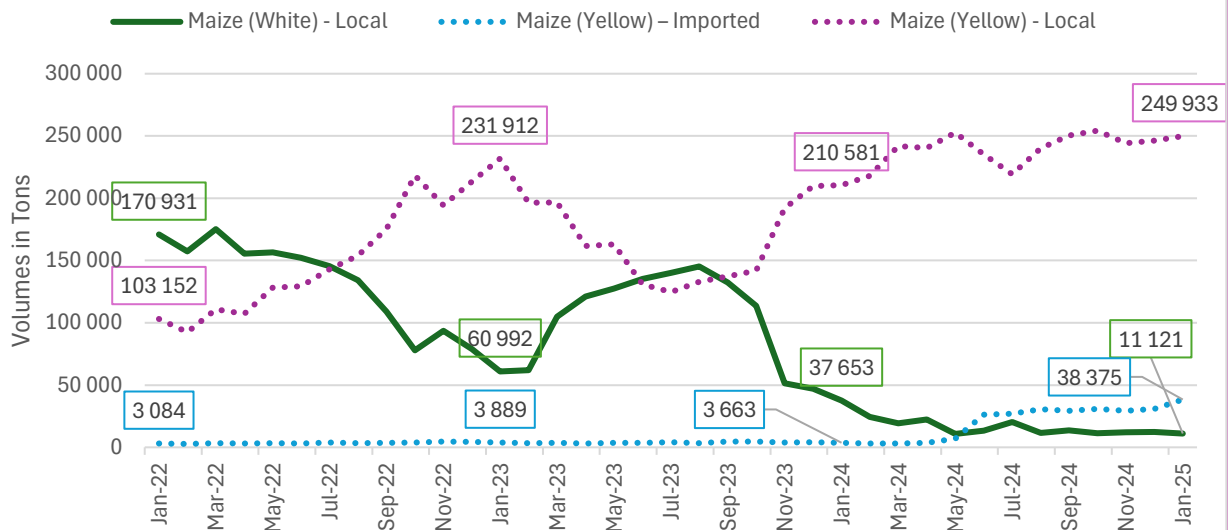
280

Year-on-Year
Difference (Tons)



In January 2025, overall other feed production experienced a significant month-over-month increase of 15.4% compared to December 2024, indicating a robust uptick in production activities. On an annual basis, there was a notable 30.7% rise in other feed sales when comparing January 2025 to January 2024, reflecting a strong year-over-year growth trajectory. This upward trend suggests increased demand for alternative feed options, potentially driven by shifts in livestock nutrition strategies or supply chain factors. Additionally, consumption patterns reveal a steady escalation in the utilization of other feed types, underscoring their growing role within the livestock feeding landscape. This sustained growth highlights the importance of monitoring market dynamics and ensuring adequate supply to meet evolving industry demands.

RAW MATERIAL USAGE



GRAIN MARKET DIGEST

The Grain Market Digest provides a comprehensive overview of recent developments shaping the global grain and oilseed markets. Amid ongoing U.S.-China trade tensions, Brazil is emerging as China's preferred soybean supplier, matching U.S. export volumes and surpassing it in shipments to China. This strategic shift is transforming global agricultural supply chains, prompting Brazil to invest in infrastructure, sustainability, and logistics to meet China's growing demands. While this positions Brazil to play a significant role in global food security, it also presents challenges related to climate and logistical constraints.

In the broader context, global protein meal trade has increased, driven primarily by higher soybean meal exports from Brazil and Argentina. These gains more than compensate for reduced rapeseed meal exports from Canada. Meanwhile, global vegetable oil production has declined, primarily due to lower palm oil output in Southeast Asia. Consequently, vegetable oil trade and stock levels have also decreased, reflecting tighter supplies and rising prices.

Turning to the corn market, global production has declined, with the United States experiencing the most significant reduction among major exporters. Ukraine's crop has also contracted sharply, and Argentina's output is forecast to be slightly lower. Conversely, Brazil faces domestic demand pressures despite a year-over-year increase in production. China, the second-largest corn importer in 2023/24, has seen its imports for both corn and sorghum plummet, down 65% and 46%, respectively, marking the largest annual decline in these imports. Overall, the global corn trade has decreased by approximately 5% from the previous year.

Brazil's ethanol industry is influencing soybean oil exports. The USDA reports that rising biodiesel production in Brazil is expected to reduce soybean oil exports by 16% in 2024/25, totaling approximately 1.3 million tons, down from earlier forecasts of 1.55 million tonnes. Despite a record soybean harvest nearing 12 million tonnes and increased crushing, domestic biodiesel demand is outpacing production growth. The Brazilian government's decision to maintain the biodiesel blend rate at 14%, rather than increasing it to 15%, has contributed to the lower export forecast.

On the production front, Brazil is anticipated to harvest one of its largest corn crops ever in 2024/25, driven by favourable weather and expanded planting areas. The CONAB estimates production at around 124.7 million tonnes—an 8.5% increase from last year—primarily from the second-season crop, which accounts for nearly 80% of total output. The USDA's slightly higher forecast of 126 million tonnes reflects an expanded planted area of 22.3 million hectares, up 4%. Early rains have notably benefited crop development in key regions such as Mato Grosso.

In Argentina, the soybean harvest has progressed to 23.6% of the suitable area, a 9.1 percentage point increase, but still behind the pace of the previous year by 12 points. The national average yield is estimated at 33 bags per hectare, with some regional variability. The corn harvest is ongoing, with 31.3% of the area harvested and an average yield of 82.1 bags per hectare, leading to an estimated production of 49 million tons, slightly lower than last year by 2.6 million tonnes. The sunflower harvest is nearly complete, with 97.1% of the suitable area harvested and a maintained production forecast of 4.7 million tonnes.

Overall, these developments highlight the dynamic shifts in the global grain and oilseed markets, influenced by trade policies, weather conditions, and evolving domestic demands, with Brazil poised to play an increasingly central role in future supply chains.

DISCLAIMER

The information contained in this Animal Feed Report shared by the Animal Feed Manufacturers Association (AFMA) is intended for general information purposes only. While every effort has been made to ensure the accuracy and reliability of the data and insights presented, AFMA makes no representations of any kind, express or implied, about the completeness, accuracy, reliability, or availability of the report or the information contained in the report for any purpose.

AFMA shall not be liable for any loss or damage, including without limitation, indirect or consequential loss or damage whatsoever arising from the use of this report or reliance on the information contained herein.

By accessing this report, you acknowledge and accept this disclaimer in full. If you do not agree with this disclaimer, you should not use or rely on the information provided in this report.