AFMA
SAFE FEED FOR SAFE FOOD
Animal Feed Manufacturers Association

Animal Feed Report

JUNE 2025

Report Released: September 2025

INTRODUCTION

Welcome to the AFMA Monthly Animal Feed Report for June 2025. This detailed report provides a thorough analysis of the animal feed industry, showcasing key data and trends that reflect the performance of feed products both month-over-month (June 2025 compared to May 2025) and year-over-year (June 2025 compared to June 2024).

- 2023: 3,561,684 tons
- 2024: 3,322,824 tons (▼6.7% vs. 2023)
- 2025: 3,489,332 tons (▲5.0% vs. 2024)

Based on the half yearly cumulative feed production for 2023, 2024, and 2025 the data shows a modest decline followed by a rebound, though overall the period remains slightly lower than 2023. Specifically, 2023 production was 3,561,684 tons, dipping to 3,322,824 tons in 2024 a year-over-year decline of about 6.7%. In 2025, production rose to 3,489,332 tons, marking a year-over-year increase of roughly 5.0% from 2024. Although 2025 reflects a recovery compared with 2024, cumulative production still remains about 2.0% below 2023 levels.

The growth trajectory in AFMA feed production is clearly reflected in both the month-on-month and year-on-year comparisons shown below, highlighting a recovery.

Month-on-Month (May → June 2025):
- May 2025 : 611,829 tons
- June 2025 : 627,272 tons
- Change : ▲15,443 tons (▲2,5%)

Year-on-Year (June 2024 → June 2025):
- June 2024 : 591,408 tons
- June 2025 : 627,272 tons
- Change : ▲35,864 tons (▲6,1%)

The data shows a clear month-on-month improvement from May to June 2025, alongside a stronger year-on-year position for June 2025 versus June 2024. Month-on-Month (May → June 2025) May 2025 recorded 611,829 tons and June 2025 reached 627,272 tons, a change of 15,443 tons or 2.5%. On the other hand, Year-on-Year (June 2024 → June 2025) shows a 35,864 ton increase, or 6.1%. This 6.1% YoY rise indicates a meaningful recovery relative to the same month a year earlier and slightly exceeds the MoM growth, pointing to broader improvements beyond routine seasonality.

Important note

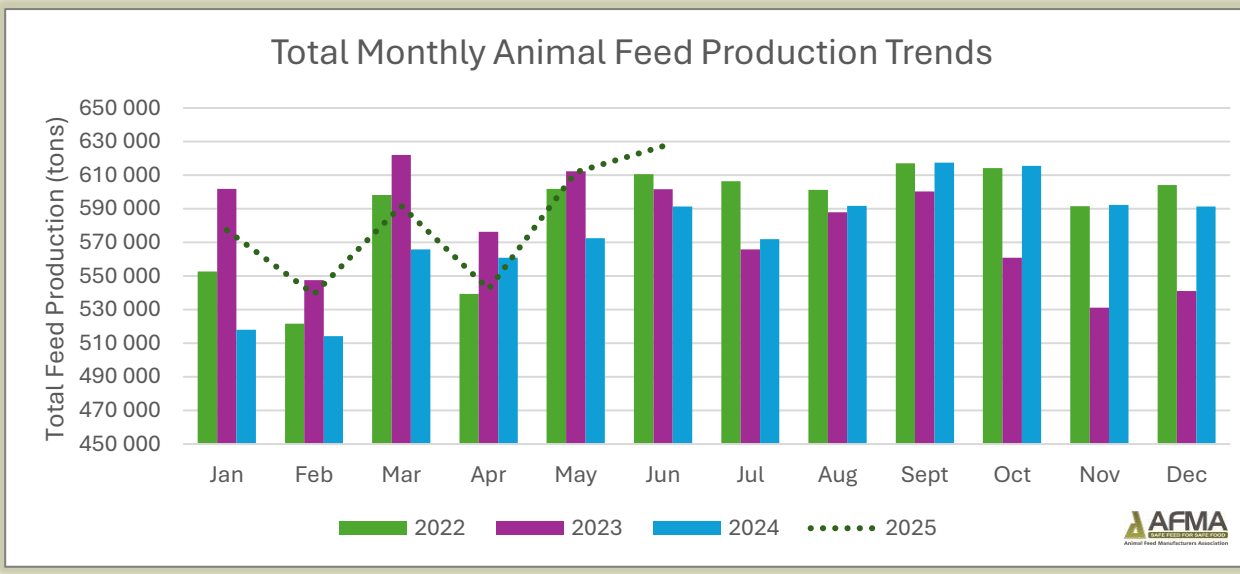
The June 2025 AFMA official data is used in this report, as the release of September 2025 offers a comparative analysis of *June 2025* with *June 2024* (year-on-year) and *June 2025* with *May 2025* (month-on-month). Total cumulative production (sum January and June).

See the link below from the AFMA website
https://www.afma.co.za/industry-statistics/

TOTAL FEED PRODUCTION

627,272	611,829	+2.5%	15,443
June 2025	May 2025	Month-on-Month Difference (%)	Month-on-Month Difference (Tons)

627,272	591,408	+6,1%	35,864
June 2025	June 2024	Year-on-Year Difference (%)	Year-on-Year Difference (*Tons*)



ANIMAL FEED SPECIES SHARE IN TOTAL FEED PRODUCTION

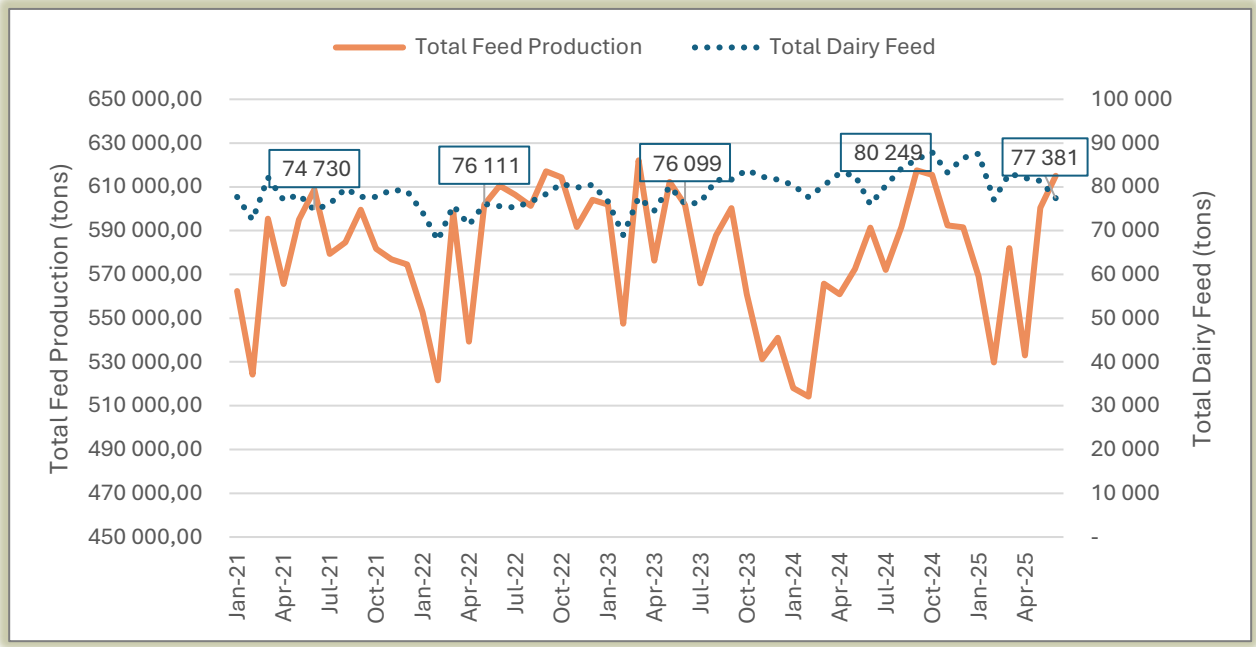
	2021	2022	2023	2024	2025	5-years Average
Dairy Feed	14,43	13,23	13,86	14,62	14,27	14,08
Beef & Sheep Feed	12,62	11,99	12,39	12,43	10,34	11,95
Pig Feed	6,06	6,66	6,55	6,72	7,01	6,60
Layer Feed	15,19	13,93	12,11	11,58	13,11	13,18
Broiler Feed	42,31	44,32	45,35	44,85	45,34	44,43
Horse Feed	0,34	0,34	0,35	0,34	0,31	0,34
Dog Food	0,02	0,01	0,02	0,04	0,04	0,03
Other Feed	0,15	0,19	0,17	0,17	0,17	0,17
Breeder Feed	8,14	8,73	8,62	8,48	8,76	8,55
Aquaculture Feed	0,05	0,13	0,13	0,13	0,11	0,11
Ostrich Feed	0,22	0,15	0,10	0,14	0,21	0,16
Rabbit Feed	0,03	0,02	0,02	0,01	0,02	0,02
Game Feed	0,42	0,30	0,33	0,47	0,32	0,37

NB: 2025 covers Jan to Jun information

DAIRY FEED

77,381	81,325	-4,8%	-3,944
June 2025	*May 2025*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)

77,381	75,942	+1,9%	1,439
June 2025	*June 2024*	*Year-on-Year* Difference (%)	*Year-on-Year* Difference (Tons)

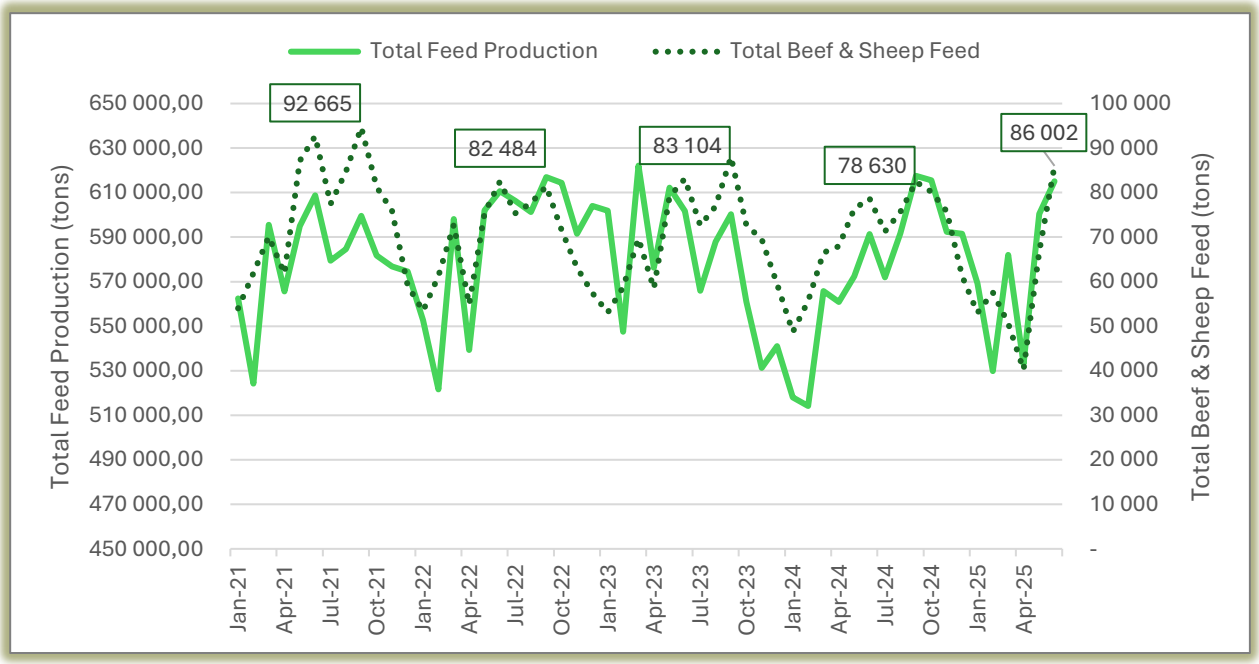


Dairy feed production for the first half of 2023 through 2025 demonstrates a generally upward trend in total output, though the pace of growth slowed between 2024 and 2025. Specifically, total production reached approximately 453,929 tons in 2023, increased to 480,046 tons in 2024, and further to 488,316 tons in 2025, reflecting a cumulative gain of about 34,387 tons from 2023 to 2025, or roughly 7.6% over the three-year period. Within June 2025, month-on-month performance declined from May to June, with production decreasing by 4.8% from 81,325 tons in May 2025 to 77,381 tons in June 2025. On a year-over-year basis, June 2025 rose modestly relative to June 2024, increasing by 1.9% from 75,942 tons to 77,381 tons. This positive year-over-year change suggests that, despite the May-to-June seasonal dip, the sector is sustaining a higher baseline level of production compared with the previous year.

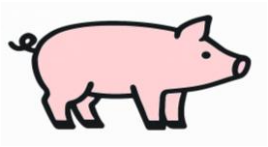
BEEF & SHEEP FEED

86,002	66,743	+28,9% ⬆	19,259
June 2025	*May 2025*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)

86,002	78,630	+9,4% ⬆	7,372
June 2025	*June 2024*	*Year-on-Year* Difference (%)	*Year-on-Year* Difference (Tons)



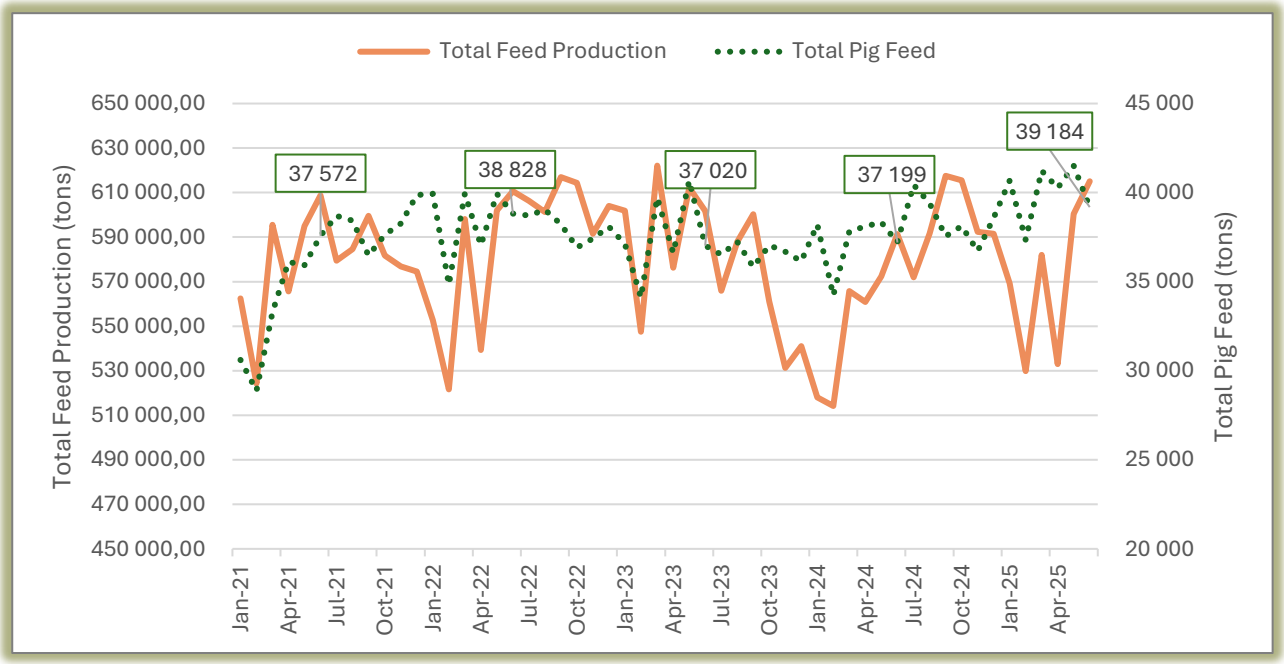
Analysis of beef and sheep feed production for the first half of each year shows a downward trend in output over time. Total production fell from 402,089 tons in 2023 to 393,788 tons in 2024 (a decline of 8,301 tons, about 2.07%), and further to 354,198 tons in 2025 (a decline of 39,590 tons, about 10.06%). On a monthly basis, production rose sharply from May to June 2025, increasing by 28.9% (from 66,743 tons in May 2025 to 86,002 tons in June 2025). This suggests a pronounced mid-year uptick in activity. Year over year, June 2025 production was 9.4% higher than June 2024 (86,002 tons vs. 78,630 tons), indicating solid June performance relative to the previous year.



PIG FEED

39,184	41,510	-5,6%	-2,326
June 2025	*May 2025*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)

39,184	37,199	+5,3%	1,985
June 2025	*June 2024*	*Year-on-Year* Difference (%)	*Year-on-Year* Difference (Tons)

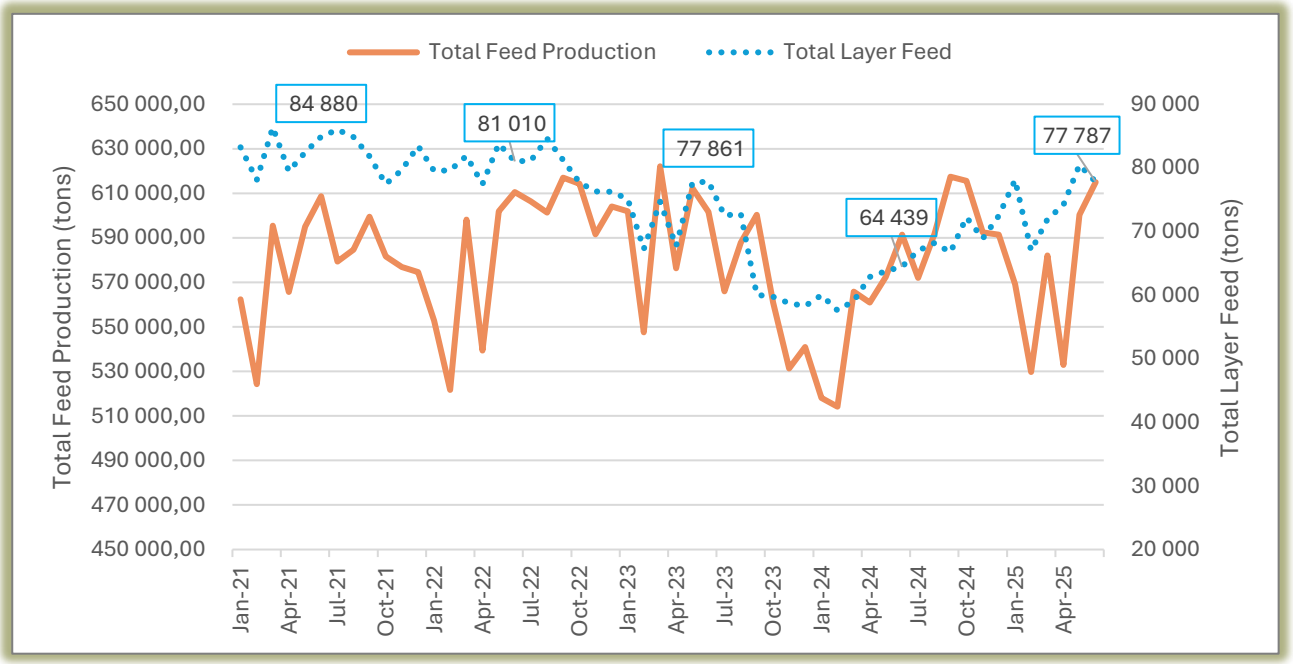


Pig feed production in the first half of the year shows a modest decline from 2023 to 2024, followed by a strong rebound in 2025. Output fell slightly from 225,260 tons in 2023 to 223,884 tons in 2024 (a 0.6% drop), before rising to 240,199 tons in 2025 resulting in an increase of 7.3% (16,315 tons) year-on-year. On a monthly basis, production declined from May to June 2025, slipping from 41,510 tons to 39,184 tons, a 5.6% decrease (2,326 tons). However, June 2025 production remained higher than the previous year, up 5.3% compared with June 2024 (39,184 tons versus 37,199 tons).

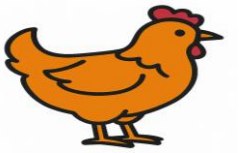
LAYER FEED

77,787	80,448	-3,3%	-2,661
June 2025	*May 2025*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)

77,787	64,439	+20,7%	13,348
June 2025	*June 2024*	*Year-on-Year* Difference (%)	*Year- on-Year* Difference (Tons)



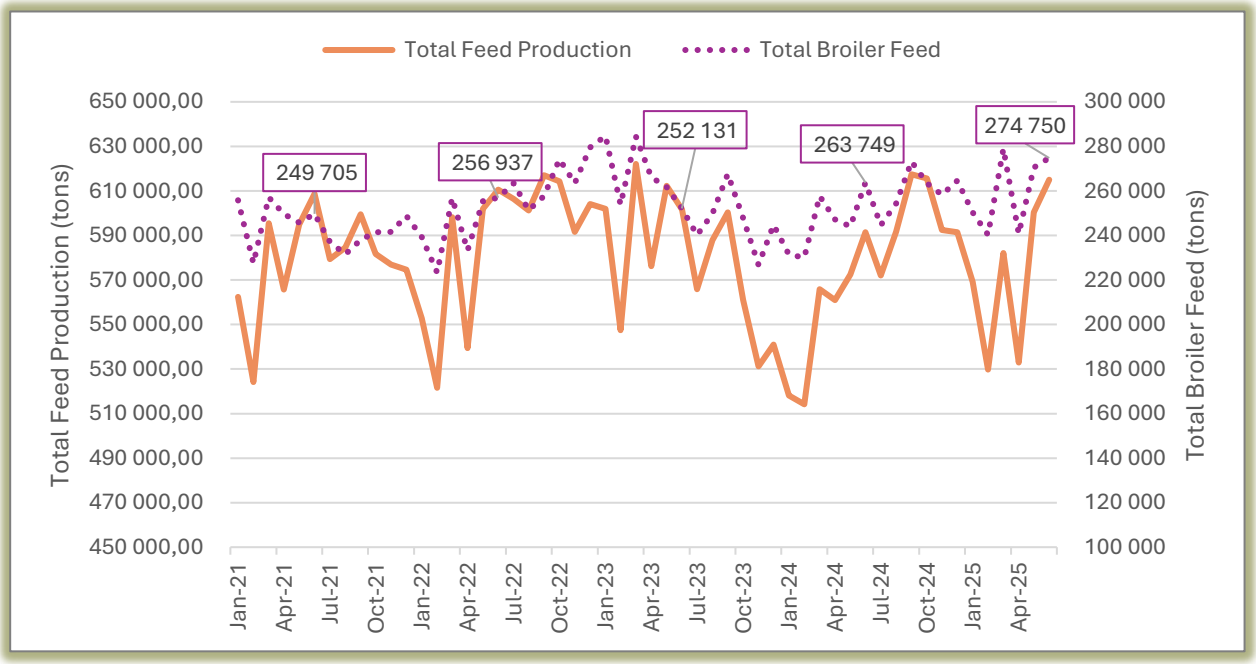
In the first half of the years analyzed, layer feed production totals show notable year-over-year shifts. The half-year figures given are 440,172 tons for 2023, 367,780 tons for 2024, and 449,376 tons for 2025. Compared with 2023, 2024's production declined by about 16.5% (367,780 vs 440,172). Then, from 2024 to 2025, production rose by approximately 22.2% (449,376 vs 367,780). These changes reflect a swing from a lower year in 2024 to a higher year in 2025, relative to the prior year. On a more granular level, month-on-month data shows a decline from May 2025 to June 2025, production dropped from 80,448 tons to 77,787 tons, a decrease of 2,661 tons, which is about a 3.3% decline. Year-on-year, June production increased from 64,439 tons in June 2024 to 77,787 tons in June 2025, a rise of 13,348 tons or roughly 20.7%. This indicates a strong annual uptick by mid-2025, even as monthly momentum softened from May to June.



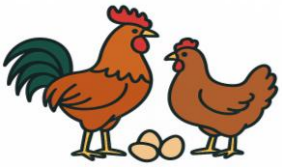
BROILER FEED

274,750	270,522	+1,6%	4,228
June 2025	*May 2025*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)

274,750	263,749	+4,2%	11,001
June 2025	*June 2024*	*Year-on-Year* Difference (%)	*Year-on-Year* Difference (Tons)



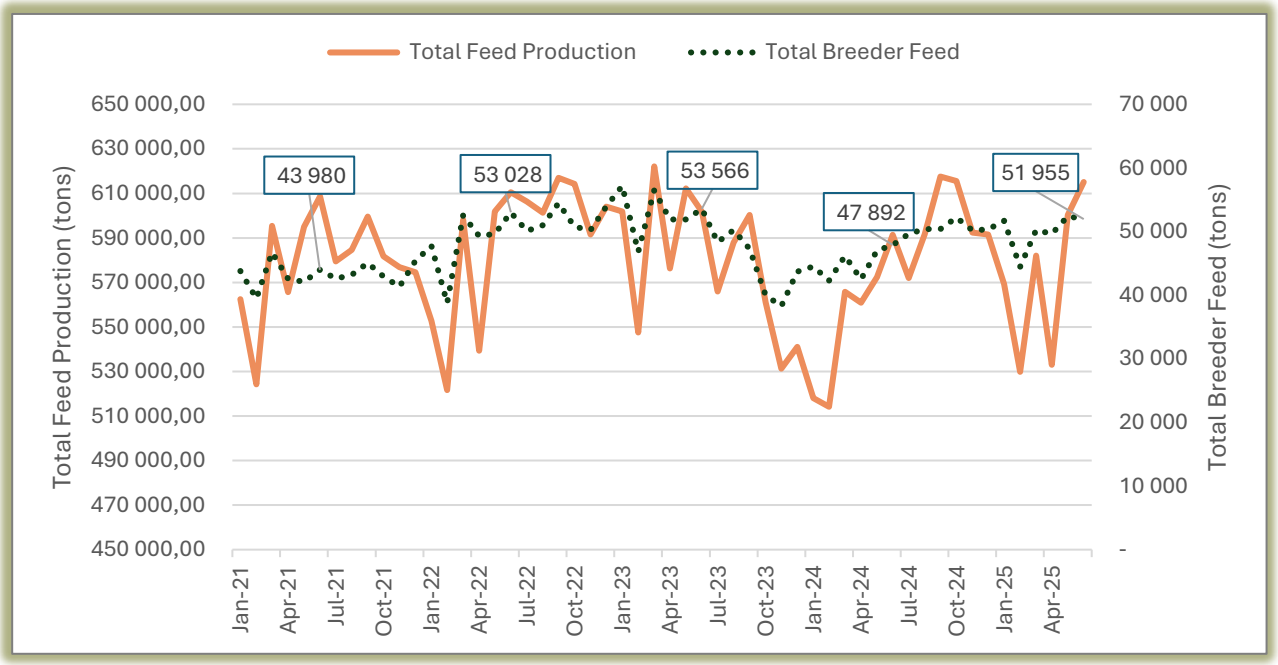
In the first half of each year, broiler feed production shows a decline from 2023 to 2024, followed by a rebound in 2025. Specifically, production fell from 1,602,916 tons in 2023 to 1,474,102 tons in 2024, a year-over-year decrease of about 8.0%. Then, production rose to 1,555,701 tons in 2025, representing a year-over-year increase of roughly 5.5% from 2024. On a month-on-month basis, there was a small but notable uptick from May to June 2025. Production grew from 270,522 tons in May 2025 to 274,750 tons in June 2025, equating to an increase of about 1.6% month-on-month. Year-on-year for June also indicates growth: production in June 2025 was 274,750 tons, up from 263,749 tons in June 2024, an increase of about 4.2%. This aligns with the broader partial-year trend of rising output into mid-2025 after the earlier 2024–2025 rebound. This steady mid-year recovery highlights broiler feed's continued role as the dominant contributor to total feed production volumes within AFMA's dataset.



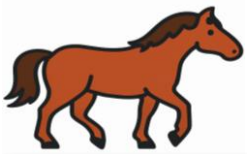
BREEDER FEED

51,955	52,387	-0,8%	-432
June 2025	*May 2025*	Month-on-Month Difference (%)	Month-on-Month Difference (Tons)

51,955	47,892	+8,5%	4,063
June 2025	*June 2024*	Year-on-Year Difference (%)	Year-on-Year Difference (*Tons*)



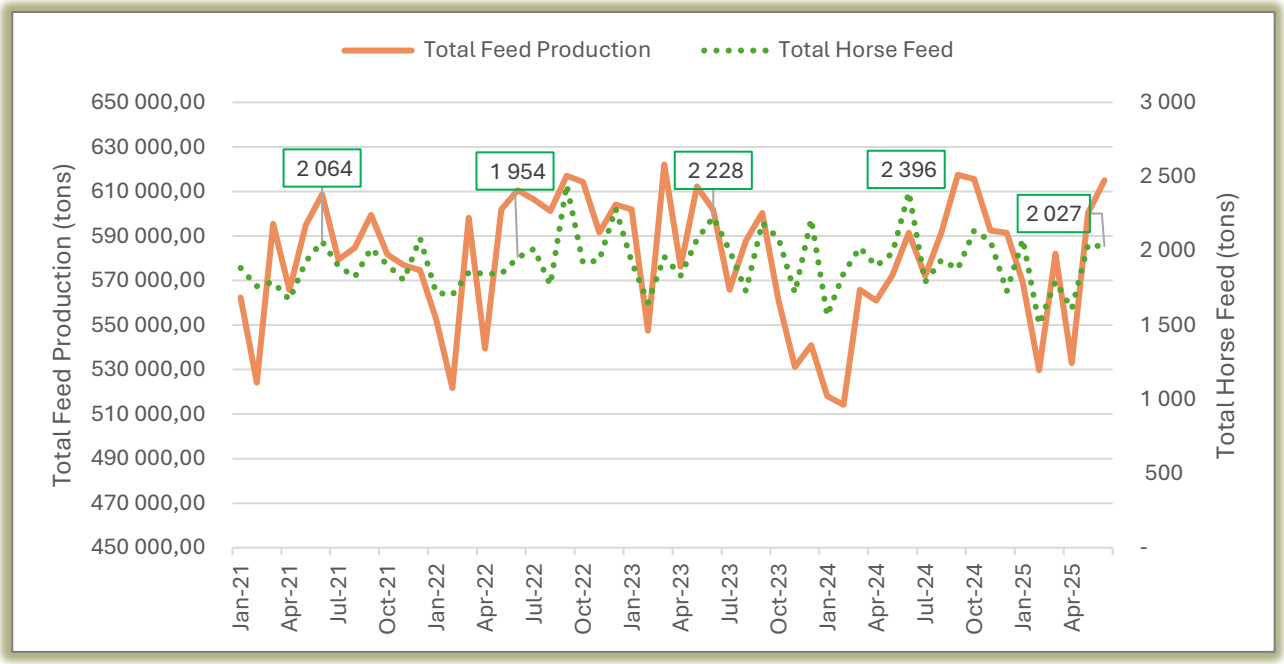
The half-yearly breeder feed production was 317,795 tons in 2023, which declined to 270,340 tons in 2024 resulting in a drop of about 14.9%. The following year, 2025, rebounded to 300,381 tons, representing an increase of approximately 11.1% from 2024. Overall, from 2023 to 2025, production decreased by about 5.5% (from 317,795 tons to 300,381 tons). On a monthly basis, May to June 2025 experienced a slight decline. May production stood at 52,387 tons, dropping to 51,955 tons in June, a decrease of roughly 432 tons. This translates to about a 0.8% month-on-month decline (approximately 0.83%). Year-on-year, however, June 2025 rose compared with June 2024. June 2024 produced 47,892 tons, while June 2025 produced 51,955 tons, an increase of about 4,063 tons or roughly 8.5%. This indicates a positive year-over-year momentum for June, contrasting with the minor month-to-month dip observed from May to June 2025.



HORSE FEED

2,027	2,041	-0,7%	-14
June 2025	*May 2025*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)

2,027	2,396	-15,4%	-369
June 2025	*June 2024*	*Year-on-Year* Difference (%)	*Year-on-Year* Difference (Tons)

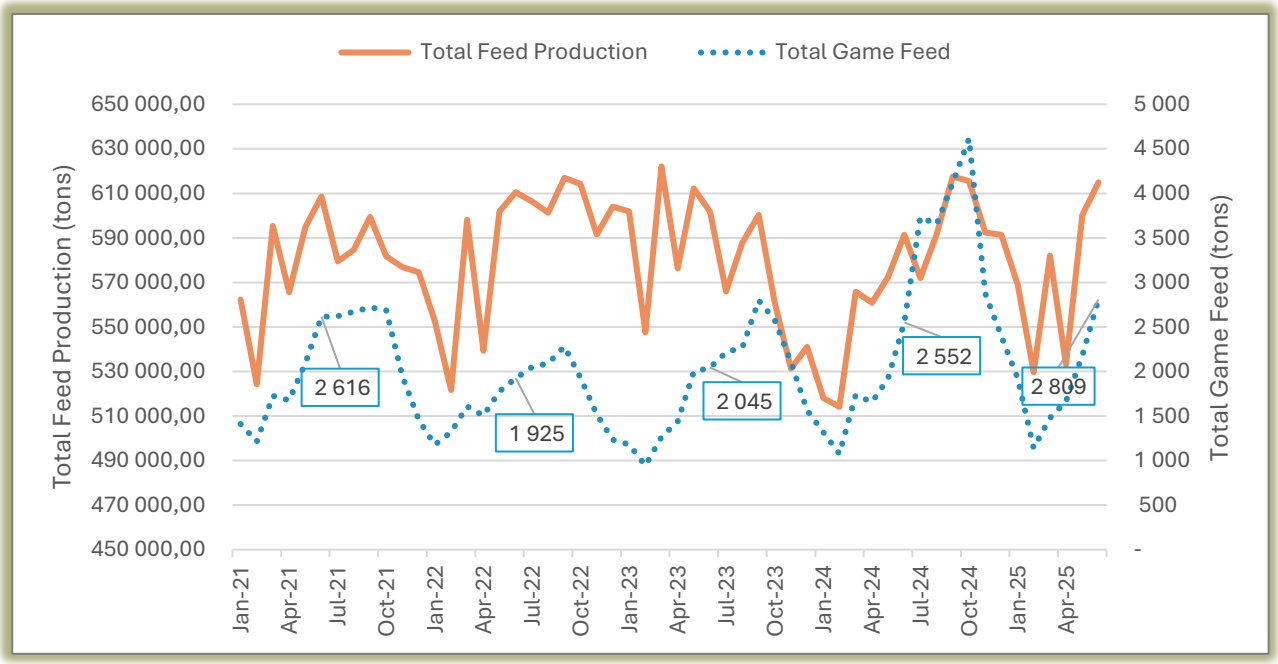


Total horse feed production for the first half of each year shows small changes year over year. In 2023, production was 11,676 tons. It rose slightly to 11,713 tons in 2024, a year-over-year increase of about 0.32% (growth of 37 tons on 11,676). However, in 2025 production declined to 11,054 tons, representing a year-over-year decrease of about 5.63% relative to 2024 (a drop of 659 tons from 11,713). From May 2025 to June 2025, month-on-month production declined from 2,041 tons to 2,027 tons, a decrease of 14 tons, which is approximately a 0.70% drop. On a year-over-year basis for June, production fell from 2,396 tons in June 2024 to 2,027 tons in June 2025, a decline of about 15.4% (a decrease of 369 tons).

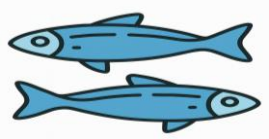
GAME FEED

2,809	2,180	+28,9%	629
June 2025	*May 2025*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)

2,809	2,552	+10,1%	257
June 2025	*June 2024*	*Year-on-Year* Difference (%)	*Year-on-Year* Difference (Tons)



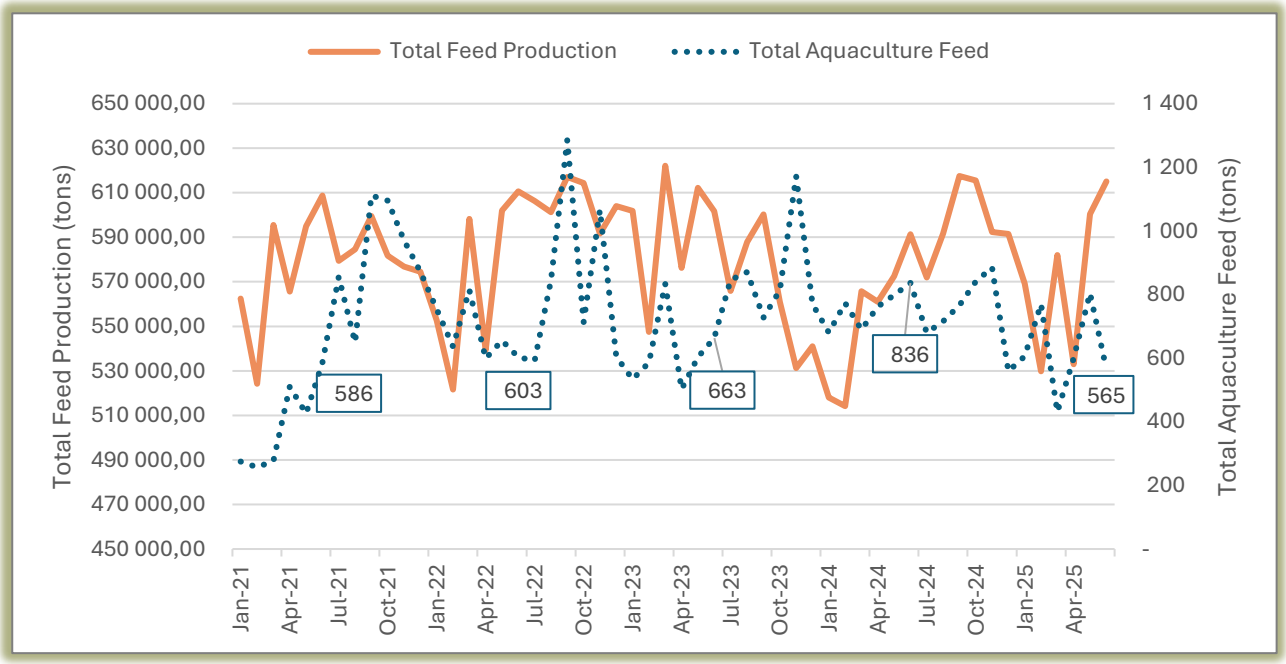
The annual feed production totals show steady growth from 2023 through 2025. In 2023, production was 8,867 tons. It rose to 10,258 tons in 2024, representing a growth of about 15.7% year over year. In 2025, production reached 11,202 tons, which is roughly 9.2% higher than 2024. Overall, the first half of 2025 continued the upward trend, with substantial month-on-month and year-on-year gains in June. On a month-on-month basis, production increased from 2,180 tons in May 2025 to 2,809 tons in June 2025, a rise of 28.9%. This jump is consistent with the broader growth pattern seen in 2025, pointing to stronger production activity heading into the second half of the year. Year-on-year, June 2025 production was 2,809 tons, up from 2,552 tons in June 2024, a 10.1% increase. This June YoY growth alongside the May-to-June month-on-month surge highlights both a healthy annual expansion and a notable monthly acceleration in production.



AQUACULTURE FEED

565	804	-29,7% ↓	-239
June 2025	*May 2025*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)

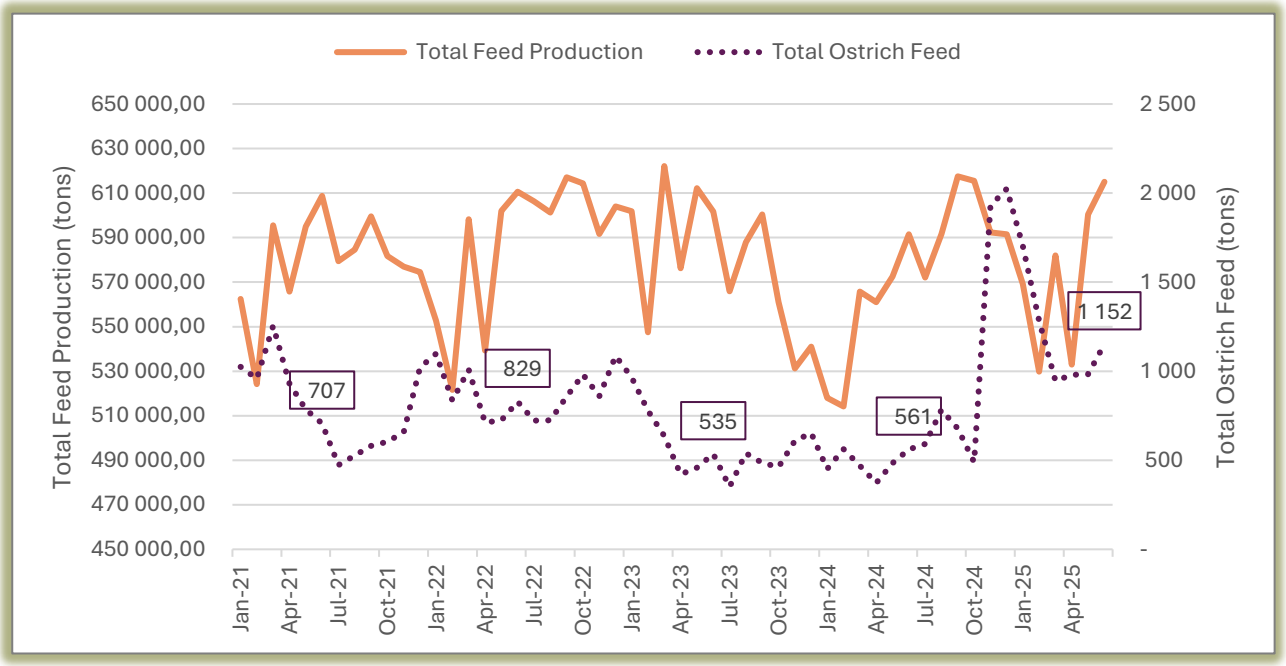
565	836	-32,5% ↓	-271
June 2025	*June 2024*	*Year-on-Year* Difference (%)	*Year-on-Year Difference* (Tons)



The aquaculture feed production figures show an overall rise from 2023 to 2024, followed by a decline in 2025. Specifically, increased from 3,721 tons in 2023 to 4,539 tons in 2024, which is an approximate year-over-year growth of 21.9%. However, production then fell to 3,776 tons in 2025, representing a year-over-year decline of about 16.8% relative to 2024. Looking at month-on-month dynamics within 2025, the data show a substantial drop from May to June. May 2025 produced 804 tons, dropping to 565 tons in June 2025. The month-on-month decline is 239 tons, which is about a 29.7%. For year-on-year comparisons at the June mark, production declined from 836 tons in June 2024 to 565 tons in June 2025. This is a drop of 271 tons, i.e., about a 32.5% year-over-year decrease.

OSTRICH FEED

1,152 June 2025	983 May 2025	+17,2% Month-on-Month Difference (%)	169 Month-on-Month Difference (Tons)
1,152 June 2025	561 June 2024	+105,4% Year-on-Year Difference (%)	591 Year-on-Year Difference (Tons)

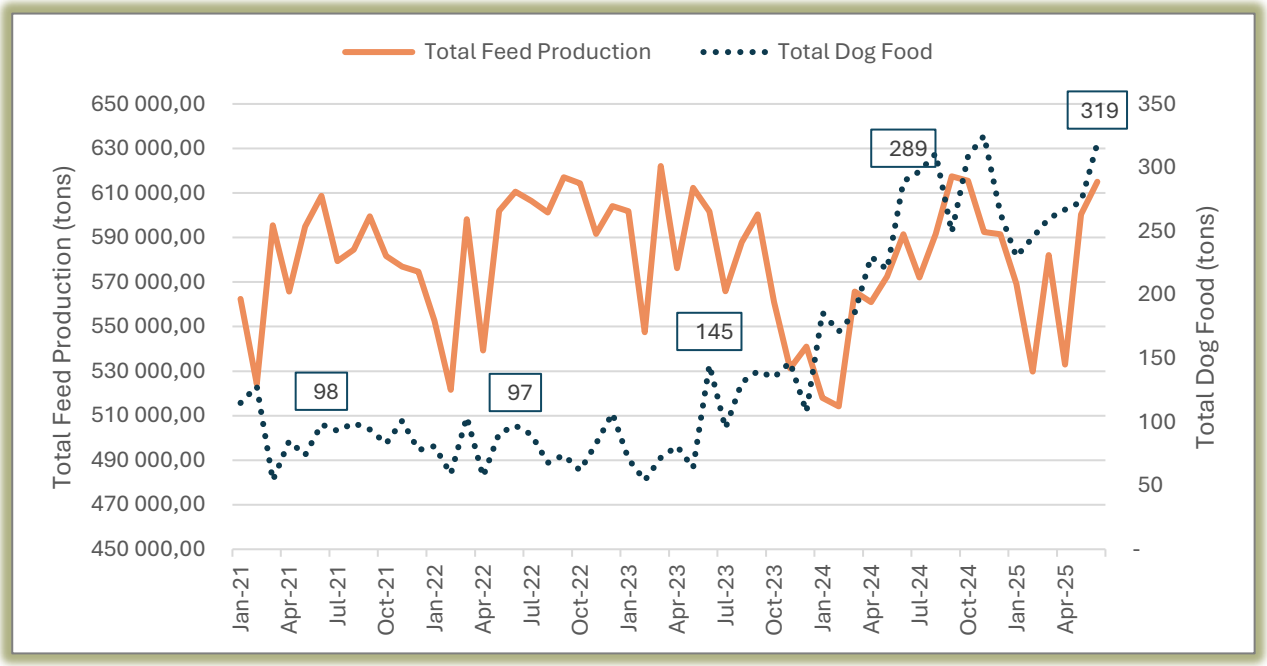


The analysis of ostrich feed production for the first half of 2023, 2024, and 2025 shows notable shifts across the three-year span. In 2023, production totaled 3,795 tons, but it declined to 2,901 tons in 2024, representing a decrease of about 23.5% year-over-year. This drop suggests either reduced demand, production constraints, or changes in feed mixes or farm activity during that period. However, the following year, 2025, saw a robust rebound to 7,047 tons, which is a substantial increase of approximately 142.9% compared with 2024, indicating a strong recovery or expansion in production capacity, demand, or both. Examining month-on-month dynamics within 2025, production rose from 983 tons in May to 1,152 tons in June, a gain of 169 tons, or about 17.2%. On a year-on-year basis, June 2025 production reached 1,152 tons, up from 561 tons in June 2024, a growth of roughly 105.4%.

DOG FEED

319	273	+16,8%	46
June 2025	*May 2025*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)

319	289	+10,4%	30
June 2025	*June 2024*	*Year-on-Year* Difference (%)	*Year-on-Year* Difference (Tons)

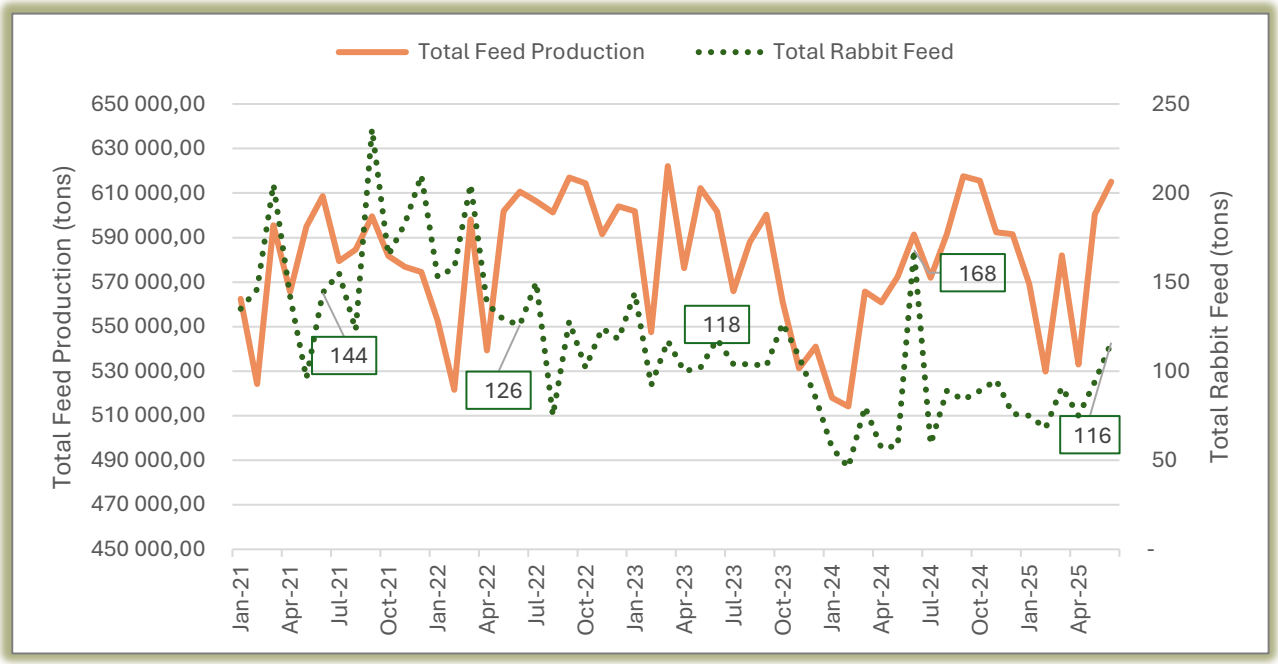


The first half-year production data show strong upward momentum across 2023, 2024, and 2025. Specifically, production for the first half of 2023 was 487 tons, which jumped to 1,282 tons in the first half of 2024, representing a 163.2% year-over-year increase. The improvement continued into 2025, with 1,594 tons produced in the first half, up 24.3% from the 1,282 tons in 2024. Overall, from the first half of 2023 to the first half of 2025, production more than tripled, rising by approximately 227.4%. On a month-to-month basis, the data for May and June 2025 show a robust short-term growth production rose from 273 tons in May 2025 to 319 tons in June 2025, resulting in a 16.8% increase. Year-over-year, the same-month comparison (June 2024 vs. June 2025) also confirms positive momentum, with production increasing from 289 tons to 319 tons, a 10.4% rise.

RABBIT FEED

116	94	+23,4%	22
June 2025	*May 2025*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)

116	168	-31,0%	-52
June 2025	*June 2024*	*Year-on-Year* Difference (%)	*Year-on-Year* Difference (Tons)

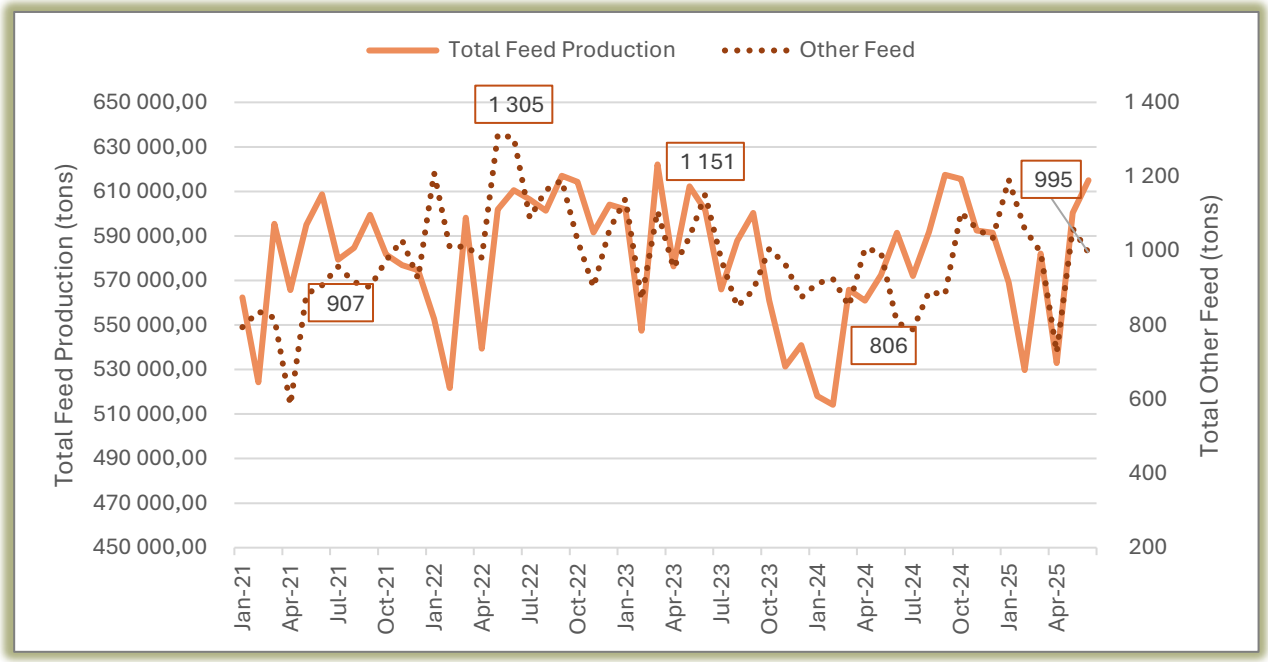


The first-half rabbit feed production figures show a clear downward shift from 2023 to 2024. Total output declined from about 673 tons in 2023 to 466 tons in 2024, representing a decrease of roughly 30.8%. This substantial drop indicates weaker production performance in 2024 compared with the prior year. In 2025, production rebounded somewhat to 519 tons, up about 11.4% from 2024. While this shows a positive year-over-year shift from 2024 to 2025, the 2025 level remains still below the 2023 peak, suggesting partial recovery but not yet a full return to the 2023 scale. On a monthly basis for May to June 2025, production rose from 94 tons to 116 tons, resulting in an increase of 23.4%. However, the year-on-year comparison reveals a decline when contrasted with June 2024, where output was 168 tons. The year-on-year change is about −31.0%. This indicates that while June 2025 showed strong month-to-month momentum, it did not compensate for the softer year-over-year performance observed in June 2025 relative to June 2024.

OTHER FEED

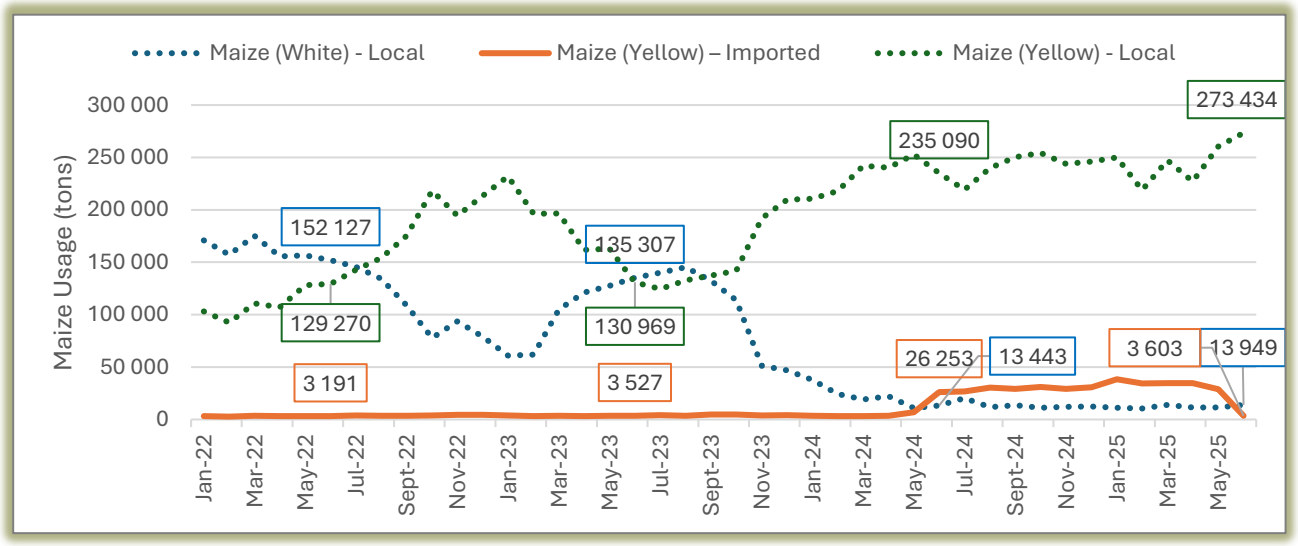
995	1,060	-6,1%	-65
June 2025	*February 2025*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)

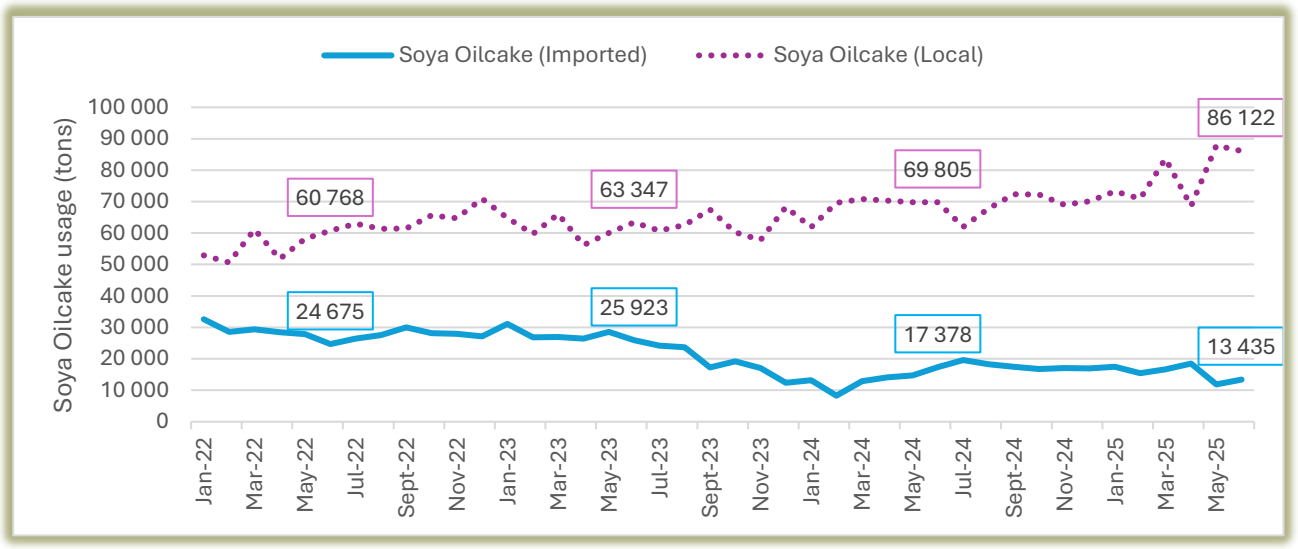
995	806	+23,6%	189
June 2025	*June 2024*	*Year-on-Year* Difference (%)	*Year-on-Year* Difference (Tons)

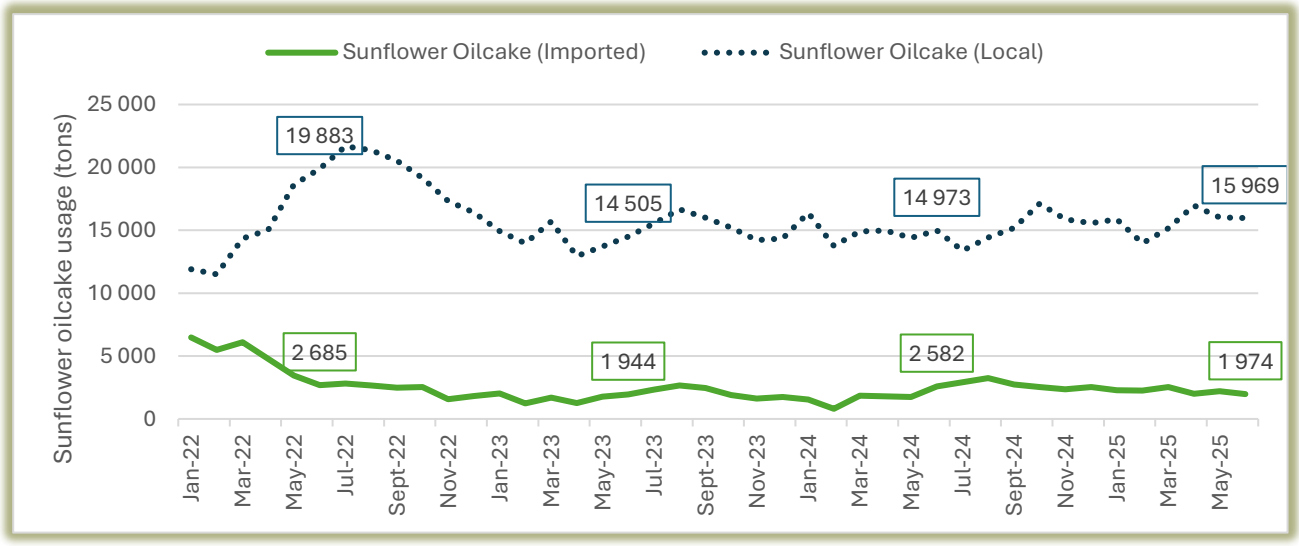


The first-half production data show a decline in other feed production from 2023 to 2024, followed by a partial rebound in 2025. Specifically, total production for the period dropped from 6,258 tons in 2023 to 5,495 tons in 2024, representing a decrease of about 12.2%. Then, in 2025 the first-half production rose to 6,028 tons, an increase of roughly 9.7% relative to 2024. The trend indicates a partial recovery after the prior year's decline, but overall, 2025's first half remains below 2023's level by about 3.5%. On a month-to-month basis, May to June shows a clear production fell from 1,060 tons in May to 995 tons in June 2025, a decrease of approximately 6.1%. Year-on-year performance in June underscores a strong positive shift as June 2025 production reached 995 tons, up from 806 tons in June 2024, a growth of about 23.5%.

RAW MATERIAL USAGE







GRAIN MARKET DIGEST

The global oilseeds production forecast is raised in September on higher Canada rapeseed, Russia soybean, and Russia and Kazakhstan sunflower seed, offsetting declines in India soybeans and Ukraine and EU sunflower seed production. Global oilseeds trade is down on decreased Canada rapeseed and U.S. soybean exports largely offsetting increased exports of Russia and Canada soybeans. Global oilseeds crush is down on decreased India and Argentina soybean, China rapeseed, and Ukraine and EU sunflower seed crush, offsetting increased U.S. soybean, Canada rapeseed, and Russia and Kazakhstan sunflower seed crush. Global oilseeds ending stocks are forecast higher on raised Canada rapeseed offsetting decreased Argentina soybean stocks. Global oilseed meal trade is raised on higher India rapeseed and U.S. soybean meal exports, offsetting a reduction in India soybean meal exports. Global vegetable oil trade is lowered on decreased Ukraine sunflower seed, Guatemala and Cote d'Ivoire palm, and Argentina soybean oil exports, offsetting increases in Russia and Kazakhstan sunflower seed oil exports.

Since the release of the last WASDE report, soybean export prices were largely unchanged despite some midperiod fluctuations. U.S. soybean export prices increased to $415/ton in late August following reports of worsening crop conditions. This reversed in September as U.S. soybean prices retreated again, in part due to lack of demand from China. Brazil prices were relatively stable but are now trading at a $40/ton premium to U.S. beans. Soybean meal prices remained higher than the July average but were largely unchanged on net since the last WASDE. U.S. soybean meal prices fell alongside soybeans in early September but maintained a premium over Brazil and Argentina meal. U.S. soybean oil export prices remained elevated on strong domestic demand but declined slightly in early September, while Brazilian and Argentine soybean oil prices were comparatively flat. Ukrainian sunflower oil prices increased on reduced production expectations in the Black Sea region as old crop exportable supplies continue to diminish seasonally.

In September 2025, China raised its forecast for marketing year 25/26 soybean production slightly to 19.9 million metric tons on generally favourable weather conditions in northern China and slightly higher planted area. As of September 11, China had not made purchases of new crop U.S. soybeans and has continued to rely on South American origins. China continued its policy of providing subsidies for soybean farmers in MY 25/26, especially in northeast China, the country's major soybean production area. Given climatic and logistical constraints, farmers in northeast China have limited planting options. Corn (and rice in irrigated lowlands) provide the best returns, so the central government, provinces, and localities provide subsidies to boost soybean production.

Türkiye's MY 2025/26 sunflower seed crop is suffering from extreme drought and production levels are forecast to fall more than 10 percent from last year. Despite the expansion in area harvested, sunflower seed production is revised lower to 1.2 million metric tons due to yield-related losses resulting from extreme dry weather throughout most of the country. Yield losses are reported upwards of 50 percent compared to the long-term average and production in the region will reportedly drop by more than 100,000 MT compared to last year. Given these losses and the continued threat of drought, farmers in the Thrace region are expected to switch away from sunflowers in the coming years and start growing more drought-resistant crops like canola and barley. To compensate for this expected decline, sunflower seed and oil imports are forecast higher. The government has instituted lower tariffs to spur imports of these commodities throughout the marketing year.

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