AFMA
SAFE FEED FOR SAFE FOOD
Animal Feed Manufacturers Association

Animal Feed Report

APRIL 2026

Report Released: July 2026

INTRODUCTION

Welcome to the AFMA Monthly Animal Feed Report for June 2026. This detailed report provides a thorough analysis of the animal feed industry, displaying key data and trends that reflect the performance of feed products both month-over-month (April 2026 compared to March 2026) and year-over-year (April 2026 compared to April 2025).

- Jan – Apr 2023: 2,347,745 tons
- Jan – Apr 2024: 2,158,964 tons (▼-8.0% vs. 2023)
- Jan – Apr 2025: 2,250,231 tons (▲4.2% vs. 2024)
- Jan – Apr 2026: 2,356,686 tons (▲4.7% vs. 2025)

Cumulative animal feed production continued its recovery during the first four months of 2026, reaching 2,356,686 tons, compared with 2,250,231 tons during the corresponding period in 2025. This represents an increase of 106,455 tons (+4.7%), confirming sustained growth in feed manufacturing activity despite ongoing market uncertainty. Production has now surpassed both 2025 and 2023 cumulative levels, reflecting improved demand across the livestock industry and stronger production fundamentals.

Month-on-Month (Mar 2026→ Apr 2026):
- March 2026: 628,005 tons
- April 2026: 592,967 tons
- Change: ▼ 35,038 tons (▼-5.6%)

Year-on-Year (Apr 2025 → Apr 2026):
- April 2025: 542,160 tons
- April 2026: 592,967 tons
- Change: ▲50,807 tons (▲9,4%)

On a month-on-month basis, total animal feed production declined from 628,005 tons in March 2026 to 592,967 tons in April 2026, representing a decrease of 35,038 tons (-5.6%). The moderation follows the higher production recorded in March and suggests a return towards more typical monthly production levels rather than a deterioration in underlying market conditions. On a year-on-year basis, production increased from 542,160 tons in April 2025 to 592,967 tons in April 2026, an increase of 50,807 tons (+9.4%). The year-on-year increase indicates stronger feed production among reporting AFMA members compared with the same period last year.

Important note

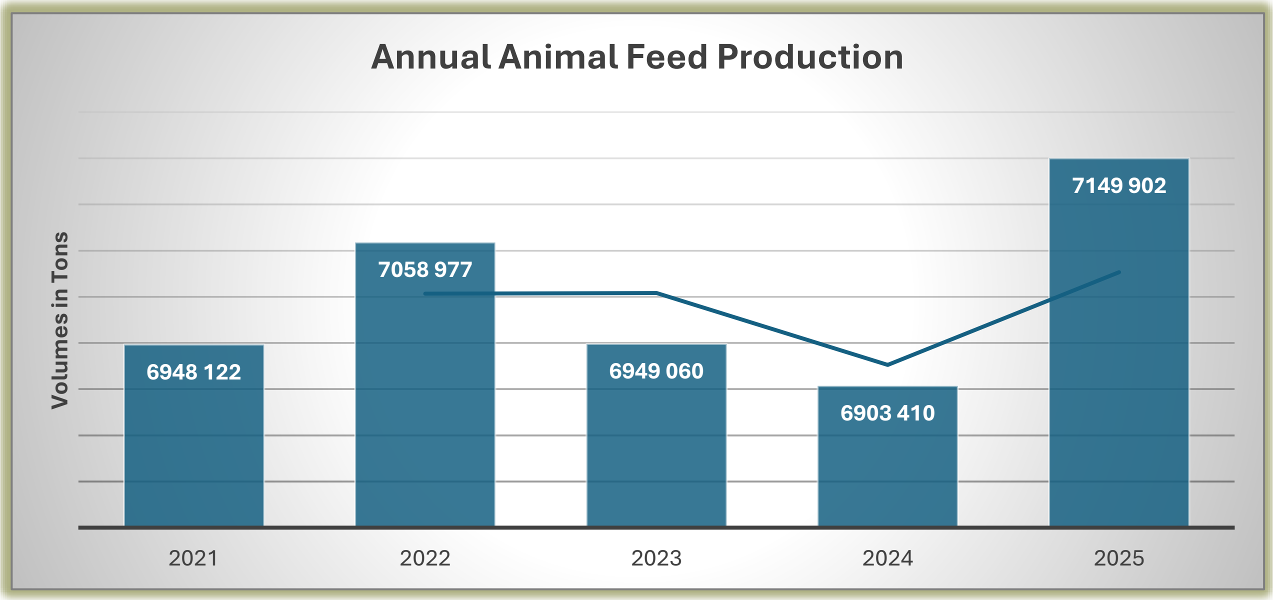
The April 2026 AFMA official data is used in this report, as the release of June 2026 offers a comparative analysis of *April 2026* with *April 2025* (year-on-year) and *April 2026* with *March 2026* (month-on-month). The cumulative figures presented reflect total feed production from January to April 2026.

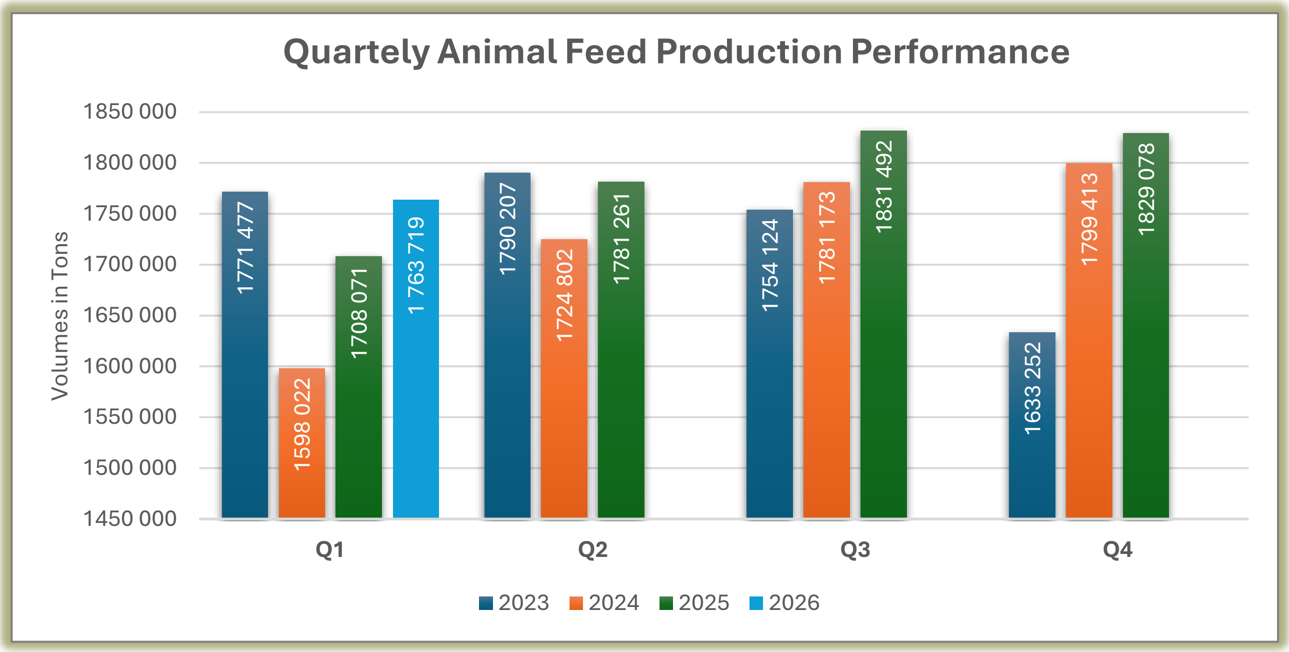
See the link below from the AFMA website!

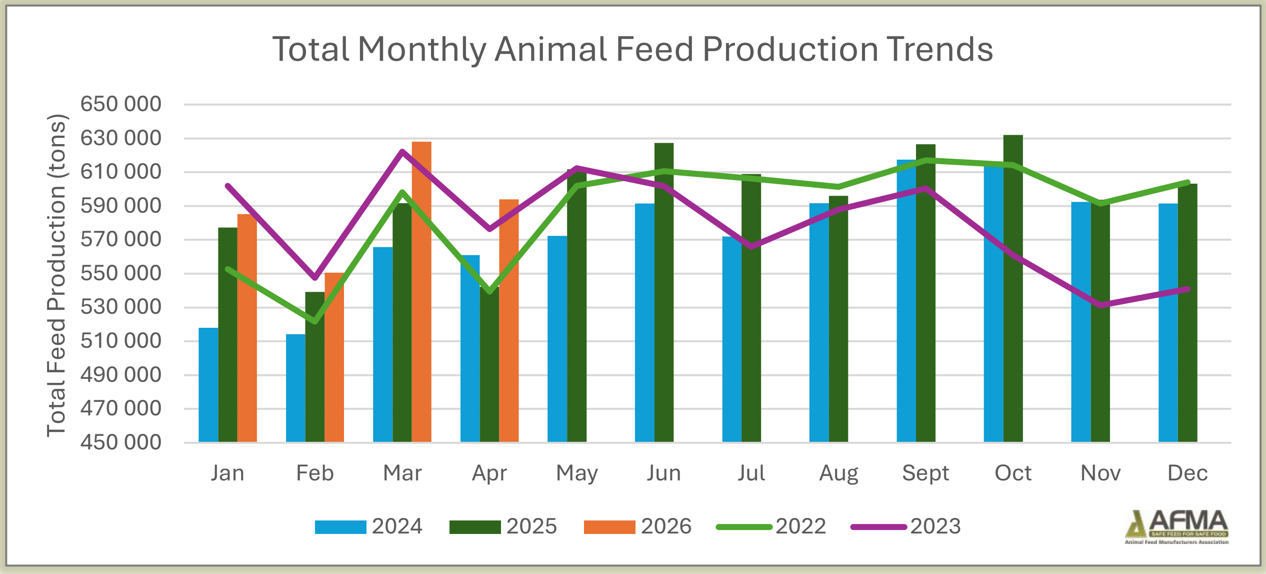
Feed Sales & Raw Material Trends - AFMA

TOTAL FEED PRODUCTION

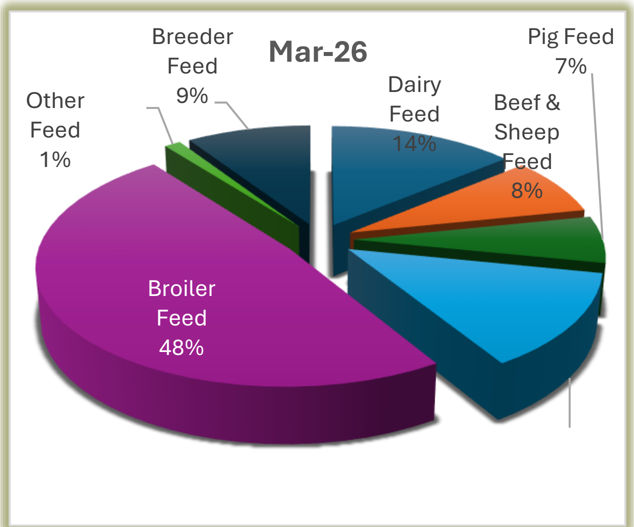
592,967	628,005	-5.6%	-35,038
April 2026	March 2026	Month-on-Month Difference (%)	Month-on-Month Difference (Tons)
592,967	542,160	+9.4%	50,807
April 2026	April 2025	Year-on-Year Difference (%)	Year-on-Year Difference (*Tons*)

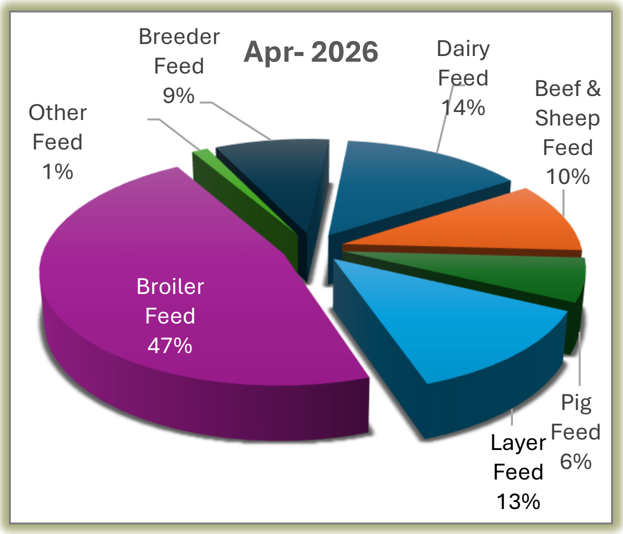


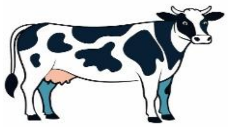




ANIMAL FEED SPECIES SHARE (%) IN TOTAL FEED PRODUCTION	2022	2023	2024	2025	2026	5-years Average
Dairy Feed	12,92	13,55	14,32	14,02	4,56	11,88
Beef & Sheep Feed	11,71	12,11	12,17	10,41	3,39	9,97
Pig Feed	6,50	6,40	6,59	6,58	2,06	5,63
Layer Feed	13,60	11,83	11,35	12,94	4,15	10,78
Broiler Feed	43,27	44,32	43,93	44,57	15,08	38,27
Horse Feed	0,33	0,34	0,34	0,32	0,10	0,29
Dog Food	0,01	0,02	0,04	0,05	0,02	0,03
Other Feed	0,19	0,17	0,16	0,17	0,07	0,15
Maize-free Feed	2,32	2,21	1,99	1,70	0,52	1,75
Breeder Feed	8,52	8,43	8,31	8,48	2,93	7,34
Aquaculture Feed	0,13	0,13	0,13	0,12	0,04	0,11
Ostrich Feed	0,15	0,10	0,14	0,20	0,06	0,13
Concentrate/Supplement	0,03	0,06	0,07	0,04	0,01	0,04
Rabbit Feed	0,02	0,02	0,01	0,01	0,00	0,01
Game Feed	0,29	0,32	0,46	0,37	0,10	-



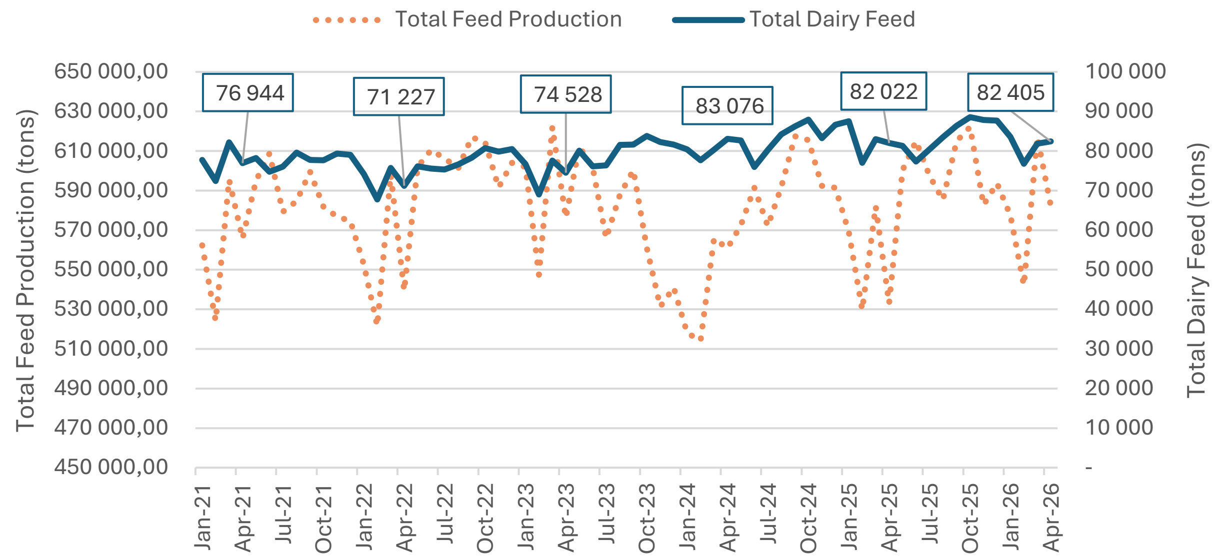




DAIRY FEED

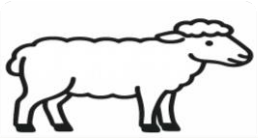
82,405	81,870	+0.7%	535
April 2026	*March 2026*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)

82,405	82,022	+0.5%	383
April 2026	*April 2025*	*Year-on-Year* Difference (%)	*Year-on-Year* Difference (Tons)



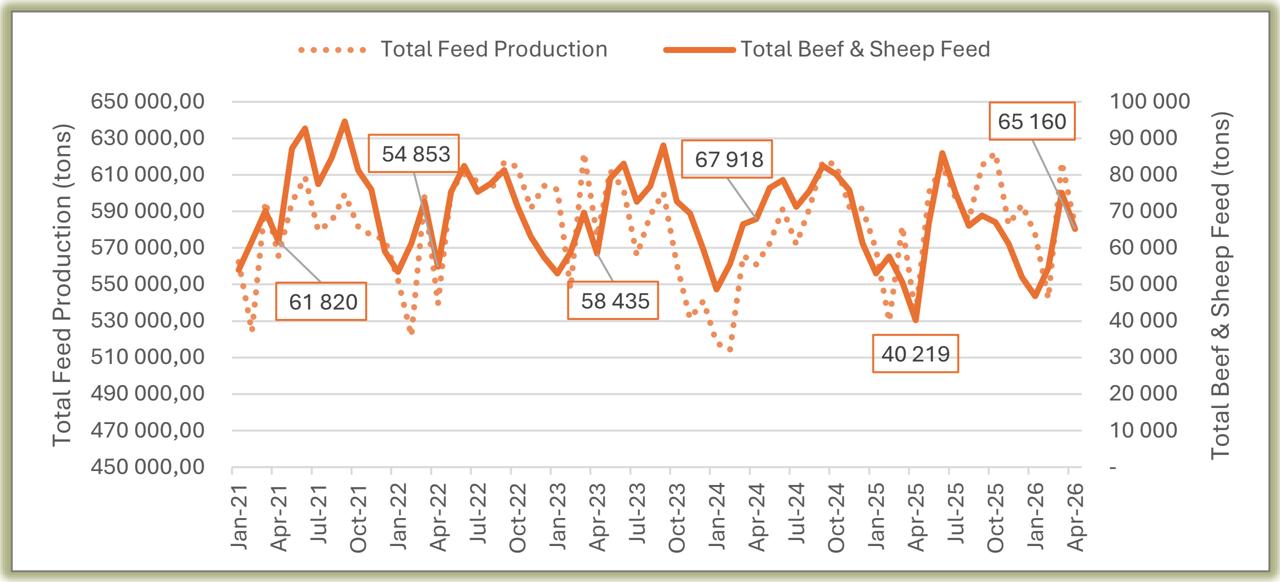
Dairy feed production remained stable during April 2026. Production increased marginally from 81,870 tons in March to 82,405 tons in April, representing a month-on-month increase of 535 tons (+0.7%). Compared with 82,022 tons in April 2025, production increased slightly by 383 tons (+0.5%), indicating that dairy feed demand continues to remain relatively stable with limited volatility.

Dairy feed production remained relatively stable during the first four months of 2026 despite a modest year-on-year decline. Cumulative production reached 324,614 tons, compared with 329,610 tons during the corresponding period in 2025, representing a decrease of 4,996 tons (-1.5%). Despite this slight contraction, dairy feed production remained above historical levels, increasing by 3,197 tons (+1.0%) compared with 321,417 tons in 2024 and by 26,875 tons (+9.0%) compared with 297,739 tons in 2023. The cumulative trend indicates that although growth has moderated relative to the previous year, the dairy industry continues to maintain a stable production base.



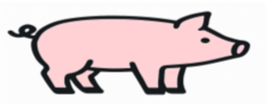
BEEF & SHEEP FEED

65,160 *April 2026*	75,104 *March 2026*	-13.2% *Month-on-Month* Difference (%)	-9,944 *Month-on-Month* Difference (Tons)
65,160 *April 2026*	40,219 *April 2025*	+62.0% *Year-on-Year* Difference (%)	24,941 *Year-on-Year* Difference (Tons)



Beef and sheep feed production moderated during April after the strong March performance. Monthly production declined from 75,104 tons to 65,160 tons, a decrease of 9,944 tons (-13.2%). Despite the monthly decline, annual performance remained exceptionally strong, increasing from 40,219 tons in April 2025 to 65,160 tons in April 2026, an increase of 24,941 tons (+62.0%).

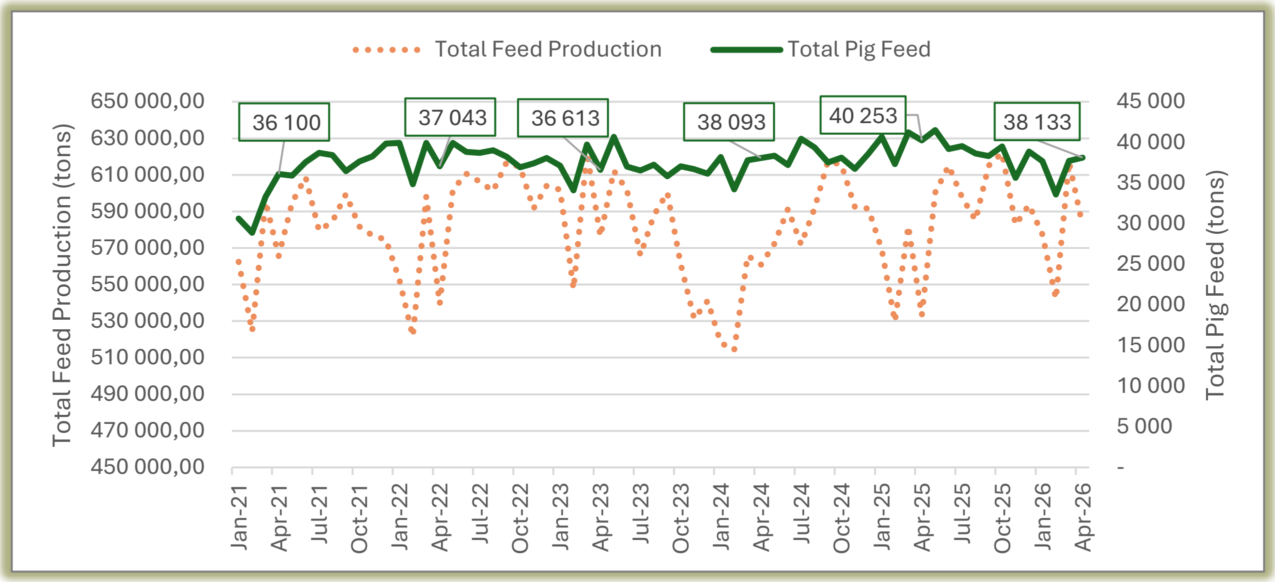
Beef and sheep feed recorded the strongest performance among the major livestock sectors during the January to April period. Cumulative production increased to 241,564 tons, compared with 201,453 tons in 2025, representing a substantial increase of 40,111 tons (+19.9%). Production also exceeded 2024 levels by 2,777 tons (+1.2%) and was 1,644 tons (+0.7%) higher than the 239,920 tons recorded during the same period in 2023. This sustained improvement indicates that the beef and sheep sector has fully recovered from previous production constraints, including disease outbreaks and weaker grazing conditions experienced in recent years.



PIG FEED

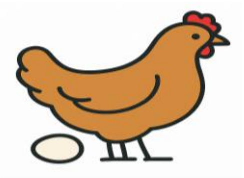
38,133	37,707	+1.1%	426
April 2026	*March 2026*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)

38,133	40,253	-5.3%	-2,120
April 2026	*April 2025*	*Year-on-Year* Difference (%)	*Year-on-Year* Difference (Tons)



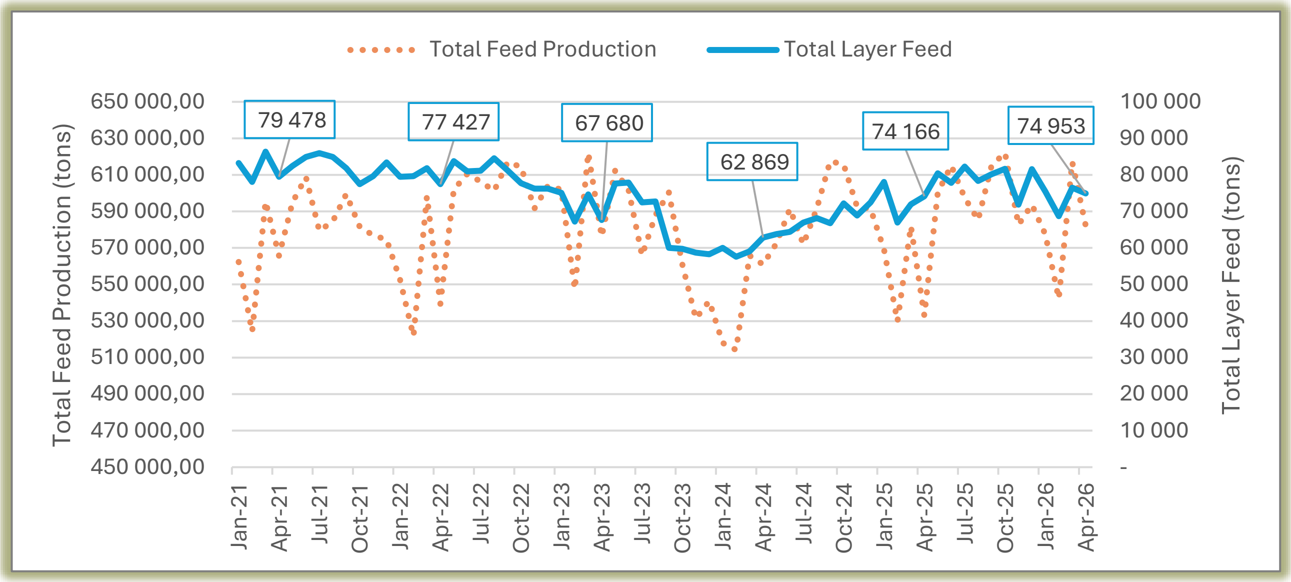
Pig feed production strengthened marginally during April, increasing from 37,707 tons to 38,133 tons, representing a 426-ton (+1.1%) month-on-month improvement. However, compared with 40,253 tons in April 2025, production declined by 2,120 tons (-5.3%), suggesting that the pig sector continues to experience softer production conditions than a year ago.

Pig feed production remained under pressure during the first four months of 2026. Cumulative production declined to 147,076 tons, compared with 159,505 tons in 2025, representing a reduction of 12,429 tons (-7.8%). Nevertheless, production remained slightly above 2024 levels by 731 tons (+0.5%) and below 2023 production by 488 tons (-0.3%). The cumulative trend suggests that pig feed demand has stabilised around longer-term production averages but remains weaker than last year.



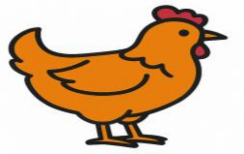
LAYER FEED

74,953	76,459	-2.0%	-1,506
April 2026	*March 2026*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)
74,953	74,166	+1.1%	787
April 2026	*April 2025*	*Year-on-Year* Difference (%)	*Year- on-Year* Difference (Tons)



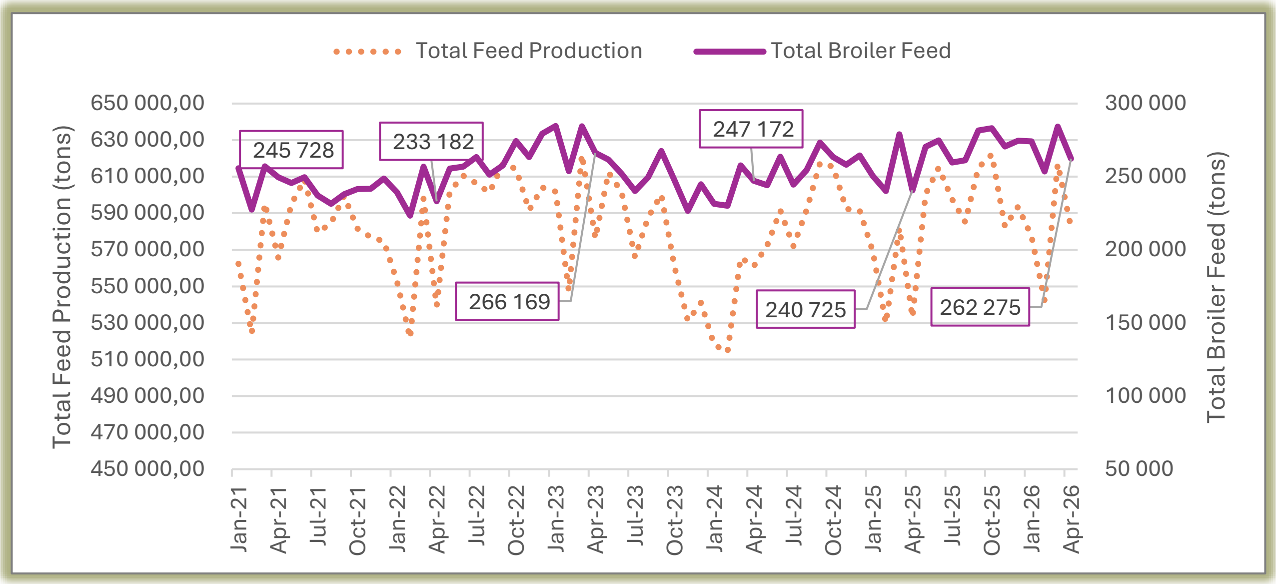
Layer feed production declined slightly during April from 76,459 tons to 74,953 tons, representing a decrease of 1,506 tons (-2.0%). Nevertheless, year-on-year production increased from 74,166 tons to 74,953 tons, reflecting a modest increase of 787 tons (+1.1%) and indicating continued stability within the egg production sector

Layer feed production maintained a steady upward trajectory during the January to April period. Cumulative production reached 295,641 tons, increasing by 4,500 tons (+1.5%) compared with 291,141 tons in 2025. Production also increased significantly above 2024 levels by 56,078 tons (+23.4%) and exceeded 2023 production by 10,975 tons (+3.9%). The cumulative data demonstrates that the layer industry has fully recovered from the lower production volumes experienced in 2024.



BROILER FEED

262,275	284,226	-7.7%	-21,951
April 2026	*March 2026*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)
262,275	240,725	+9.0%	21,550
April 2026	*April 2025*	*Year-on-Year* Difference (%)	*Year-on-Year* Difference (Tons)

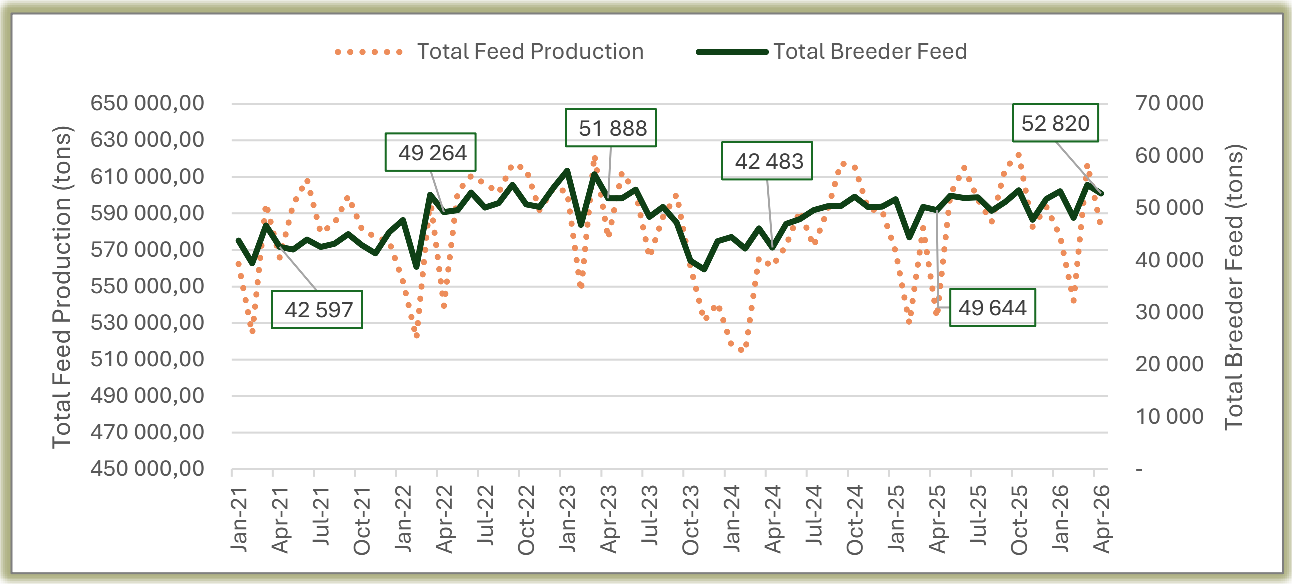


Broiler feed production remained the dominant contributor to total feed production despite easing from the March peak. Monthly production declined from 284,226 tons to 262,275 tons, representing a decrease of 21,951 tons (-7.7%). Compared with 240,725 tons in April 2025, production increased by 21,550 tons (+9.0%), confirming continued strength in poultry production and sustained demand from the broiler industry.

Broiler feed remained the largest contributor to South Africa's animal feed industry during the first four months of 2026. Cumulative production reached 1,074,365 tons, representing an increase of 63,936 tons (+6.3%) compared with 1,010,429 tons in 2025. Production also exceeded 2024 by 108,117 tons (+11.2%), although it remained 14,759 tons (-1.4%) below the exceptionally high production level recorded in 2023 (1,089,124 tons). Broiler feed accounted for approximately 45.6% of total animal feed production during the reporting period, reaffirming poultry's dominant position within South Africa's livestock industry.

BREEDER FEED

52,820	54,507	-3.1%	-1,687
April 2026	*March 2026*	Month-on-Month Difference (%)	Month-on-Month Difference (Tons)
52,820	49,644	+6.4%	3,176
April 2026	*April 2025*	Year-on-Year Difference (%)	Year-on-Year Difference (*Tons*)



Breeder feed production eased slightly during April, declining from 54,507 tons to 52,820 tons, representing a 3.1% monthly decline (1,687 tons). Annual production increased from 49,644 tons to 52,820 tons, an increase of 3,176 tons (+6.4%), reflecting continued investment and recovery within poultry breeding operations.

Breeder feed production continued to strengthen during 2026. Cumulative production increased to 208,770 tons, compared with 196,039 tons during the same period in 2025, representing growth of 12,731 tons (+6.5%). Production was also 33,343 tons (+19.0%) higher than 2024 and only 3,571 tons (-1.7%) below the 212,341 tons produced during 2023. The cumulative figures indicate that breeder feed production has almost returned to its historical peak, reflecting continued investment in breeding stock and positive expectations for future poultry production.

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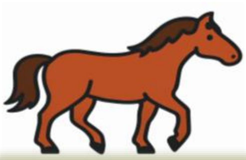
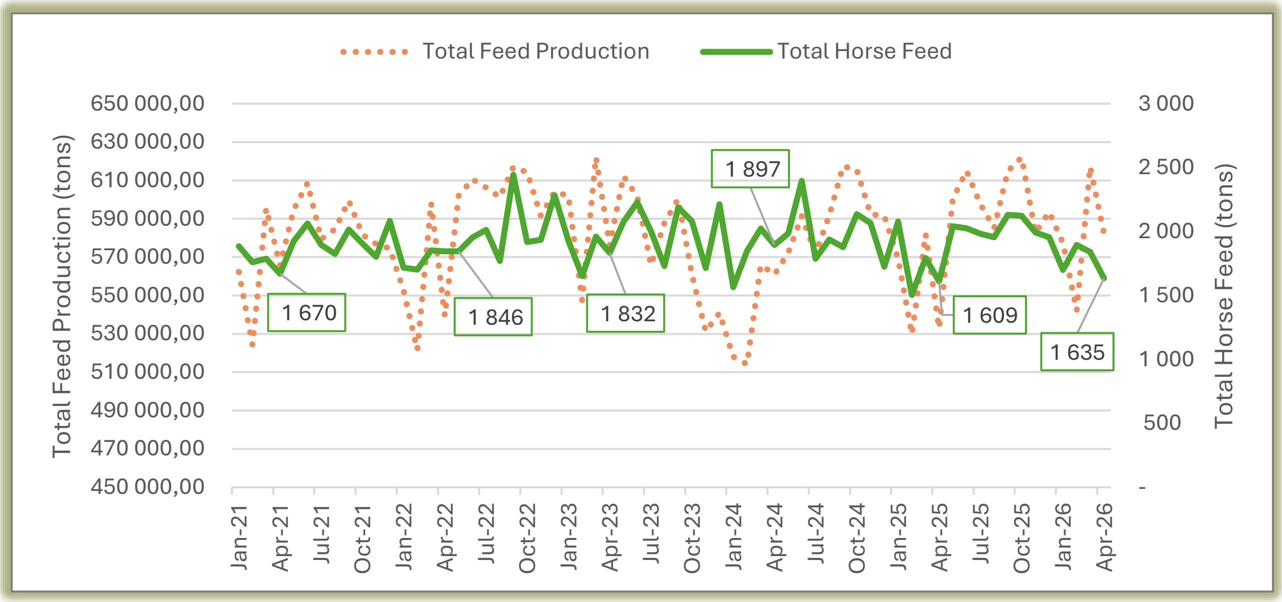


HORSE FEED

1,635	1,841	-11.2%	-206
April 2026	*March 2026*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)
1,635	1,609	+1.6%	26
April 2026	*April 2025*	*Year-on-Year* Difference (%)	*Year-on-Year* Difference (Tons)



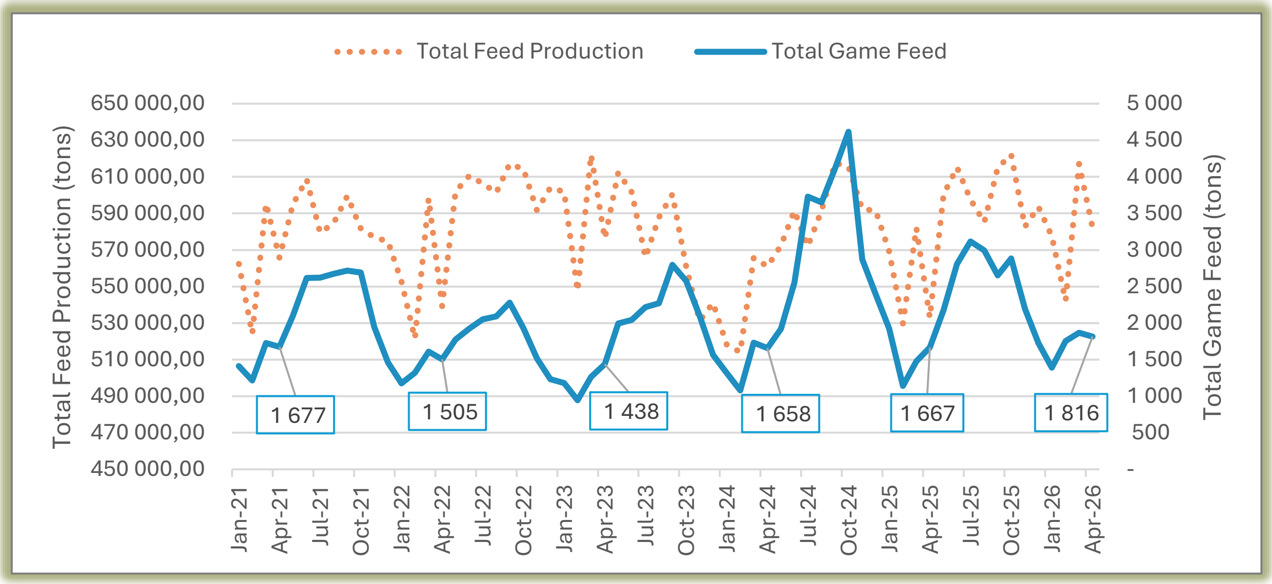
Horse feed production declined from 1,841 tons to 1,635 tons, representing a monthly decrease of 206 tons (-11.2%). Compared with 1,609 tons in April 2025, production increased marginally by 26 tons (+1.6%), suggesting relatively stable demand within the equine sector.

Horse feed production remained stable throughout the reporting period. Cumulative production totalled 7,073 tons, representing a marginal increase of 87 tons (+1.2%) compared with 2025. Production remained 259 tons (-3.5%) below 2024 and 299 tons (-4.1%) below 2023. The cumulative trend reflects a mature and relatively stable niche market with limited year-to-year variation.

GAME FEED

1,816	1,868	-2.8%	-52
April 2026	*March 2026*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)

1,816	1,667	+8.9%	149
April 2026	*April 2025*	*Year-on-Year* Difference (%)	*Year-on-Year* Difference (Tons)



Game feed production declined modestly during April from 1,868 tons to 1,816 tons, representing a 52-ton (-2.8%) decrease. Year-on-year production increased from 1,667 tons to 1,816 tons, reflecting growth of 149 tons (+8.9%), indicating continued expansion within the wildlife and game farming industry.

Game feed production maintained strong growth during the first four months of 2026. Production increased to 6,828 tons, compared with 6,213 tons in 2025, representing an increase of 615 tons (+9.9%). Production also exceeded 2024 by 1,043 tons (+18.0%) and 2023 by 2,002 tons (+41.5%). The consistent cumulative growth reflects continued expansion within South Africa's wildlife and game farming industries, supported by increasing investment in commercial game production.

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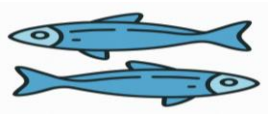
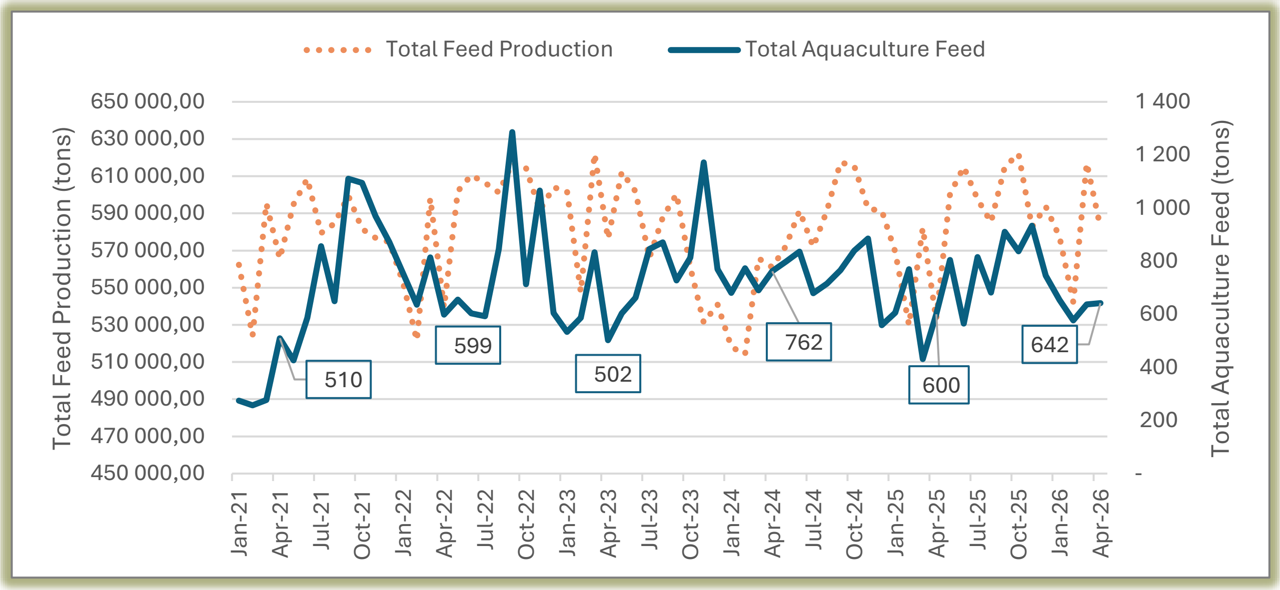


AQUACULTURE FEED

642	637	+0.8%	5
April 2026	*March 2026*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)
642	600	+7.0%	42
April 2026	*April 2025*	*Year-on-Year* Difference (%)	*Year-on-Year Difference* (Tons)

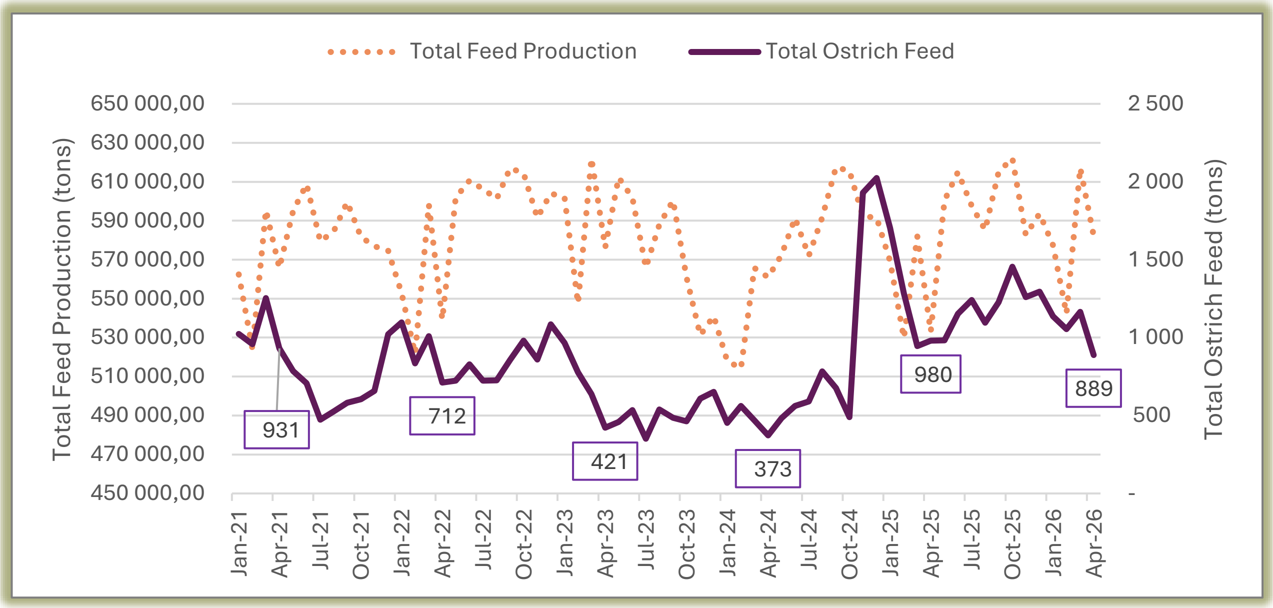


Aquaculture feed production remained relatively stable, increasing slightly from 637 tons to 642 tons, representing a 0.8% monthly improvement. Compared with 600 tons in April 2025, production increased by 42 tons (+7.0%), indicating gradual expansion within the aquaculture sector.

Aquaculture feed production increased modestly during the reporting period. Cumulative production reached 2,510 tons, increasing by 103 tons (+4.3%) compared with 2025. Production remained 395 tons (-13.6%) below 2024 but was 55 tons (+2.2%) above 2023. The cumulative trend suggests gradual recovery within the aquaculture sector, although production remains below the higher volumes achieved during 2024.

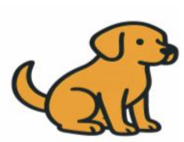
OSTRICH FEED

889 *April 2026*	1,165 *March 2026*	-23.7% Month-on-Month Difference (%)	-276 Month-on-Month Difference (Tons)
889 *April 2026*	980 *April 2025*	-9.3% Year-on-Year Difference (%)	-91 Year-on-Year Difference (Tons)



Ostrich feed production experienced the largest monthly contraction among the niche sectors, decreasing from 1,165 tons to 889 tons, a decline of 276 tons (-23.7%). Annual production also declined from 980 tons to 889 tons, representing a reduction of 91 tons (-9.3%), suggesting continued weakness in ostrich production.

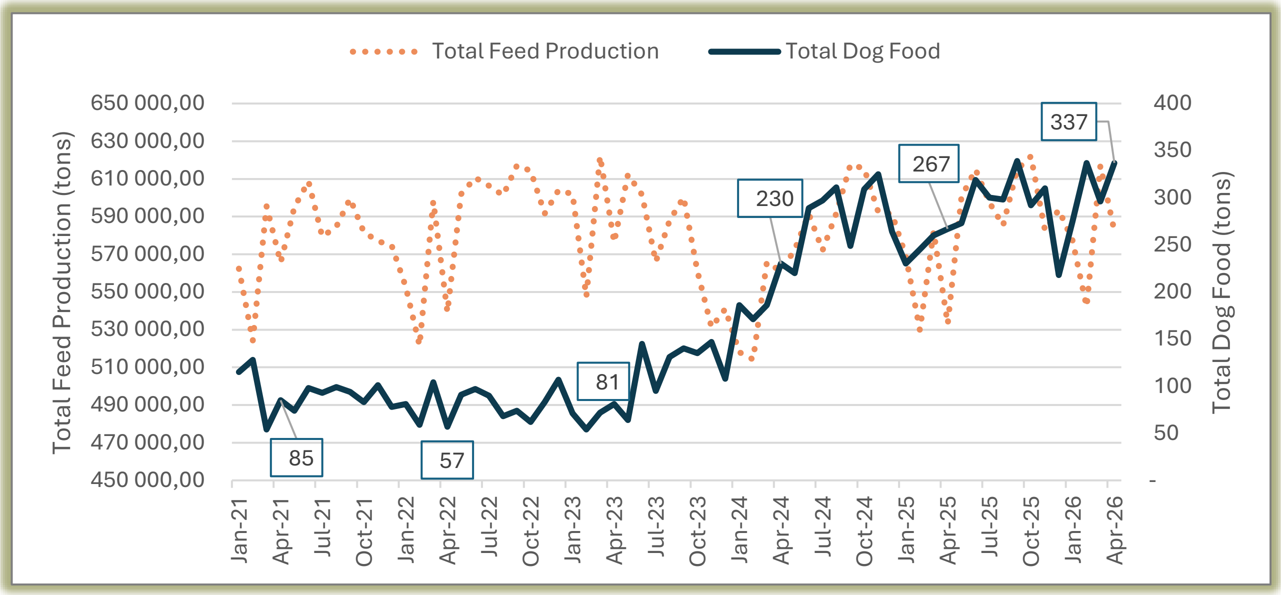
Ostrich feed production declined during the first four months of 2026. Cumulative production reached 4,244 tons, compared with 4,912 tons during 2025, representing a decline of 668 tons (-13.6%). However, production remained substantially higher than 2024 (+128.7%) and 2023 (+51.5%). While the sector experienced a weaker start to 2026, the longer-term trend continues to reflect a stronger production base than in previous years.



DOG FOOD

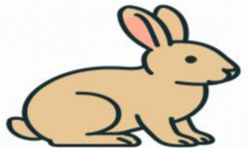
337	296	+13.9%	41
April 2026	*March 2026*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)

337	267	+26.2%	70
April 2026	*April 2025*	*Year-on-Year* Difference (%)	*Year-on-Year* Difference (Tons)



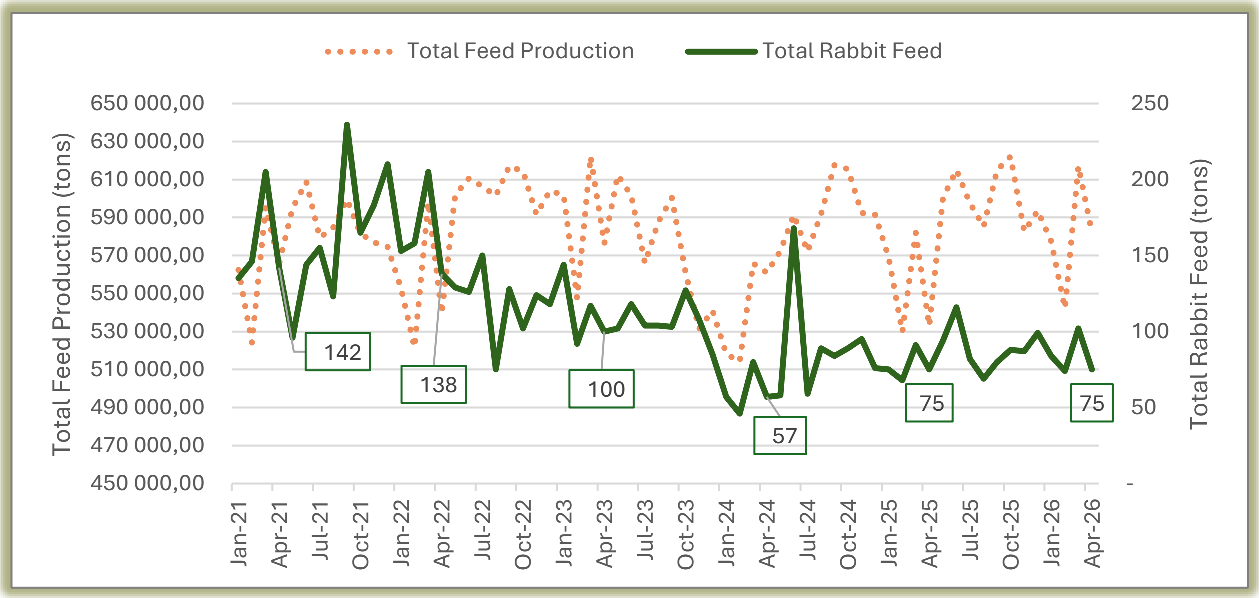
Dog food continued its strong growth trajectory. Production increased from 296 tons to 337 tons, representing a 41-ton (+13.9%) monthly increase. Compared with 267 tons in April 2025, production increased by 70 tons (+26.2%), making it one of the fastest-growing niche feed categories.

Dog food remained the fastest-growing niche feed category during the reporting period. Cumulative production increased to 1,245 tons, compared with 1,002 tons in 2025, representing growth of 243 tons (+24.3%). Production was also 472 tons (+61.1%) higher than 2024 and more than four times the 278 tons produced during 2023. The cumulative figures highlight sustained structural growth in South Africa's companion animal industry, driven by increasing pet ownership and growing demand for premium manufactured pet food.



RABBIT FEED

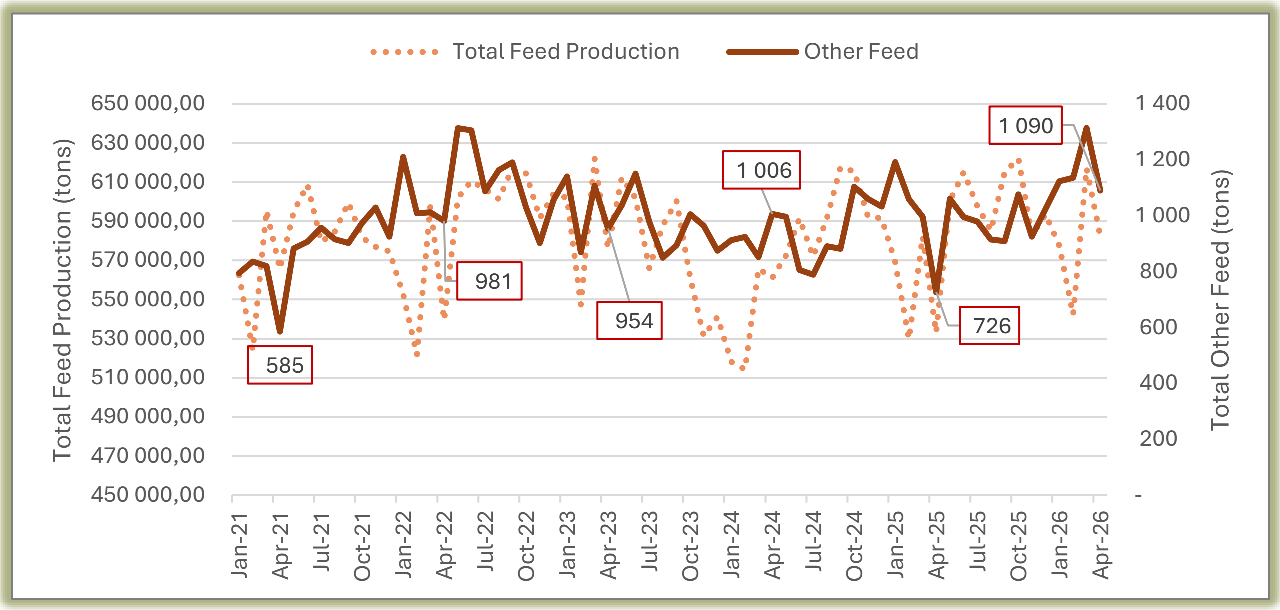
75	102	-26.5%	-27
April 2026	*March 2026*	*Month-on-Month* Difference (%)	*Month-on-Month* Difference (Tons)
75	75	+0.0%	0
April 2026	*April 2025*	*Year-on-Year* Difference (%)	*Year-on-Year* Difference (Tons)



Rabbit feed production declined sharply from 102 tons to 75 tons, representing a 27-ton (-26.5%) decrease. Production was unchanged compared with April 2025 (75 tons), resulting in 0% year-on-year growth. Cumulative production increased to 335 tons, compared with 309 tons in 2025, representing growth of 26 tons (+8.4%). Production also exceeded 2024 by 95 tons (+39.6%), although it remained 118 tons (-26.0%) below the 453 tons recorded during 2023. Despite positive year-on-year growth, cumulative production indicates that the rabbit feed sector has not yet recovered to historical production levels.

OTHER FEED

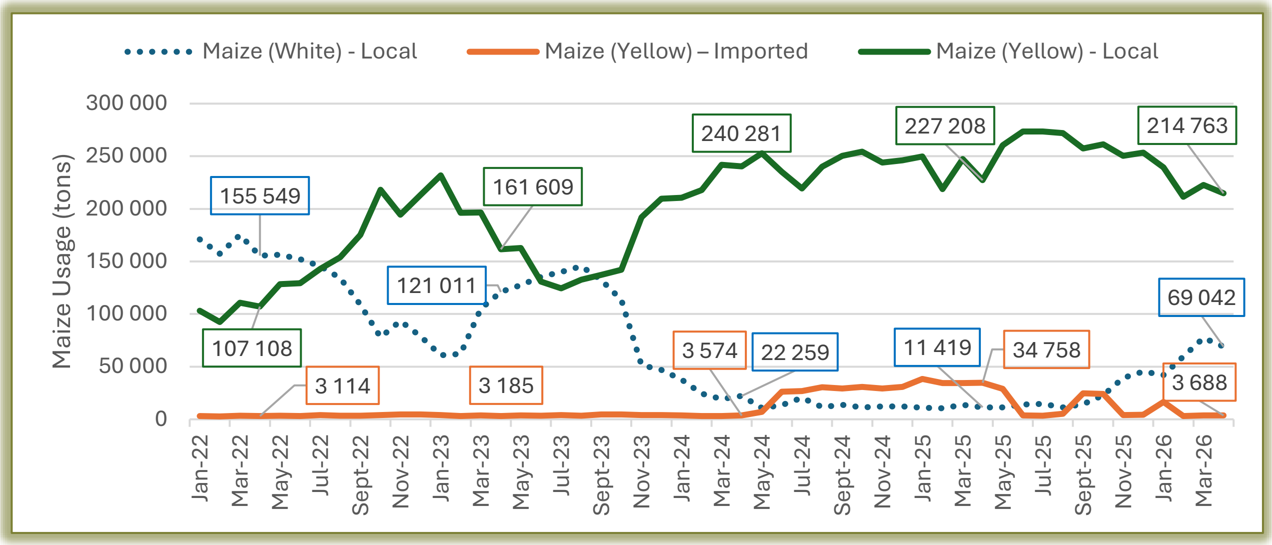
1,090 *April 2026*	1,314 *March 2026*	-17.0% *Month-on-Month* Difference (%)	-224 *Month-on-Month* Difference (Tons)
1,090 *April 2026*	726 *April 2025*	+50.1% *Year-on-Year* Difference (%)	364 *Year-on-Year* Difference (Tons)

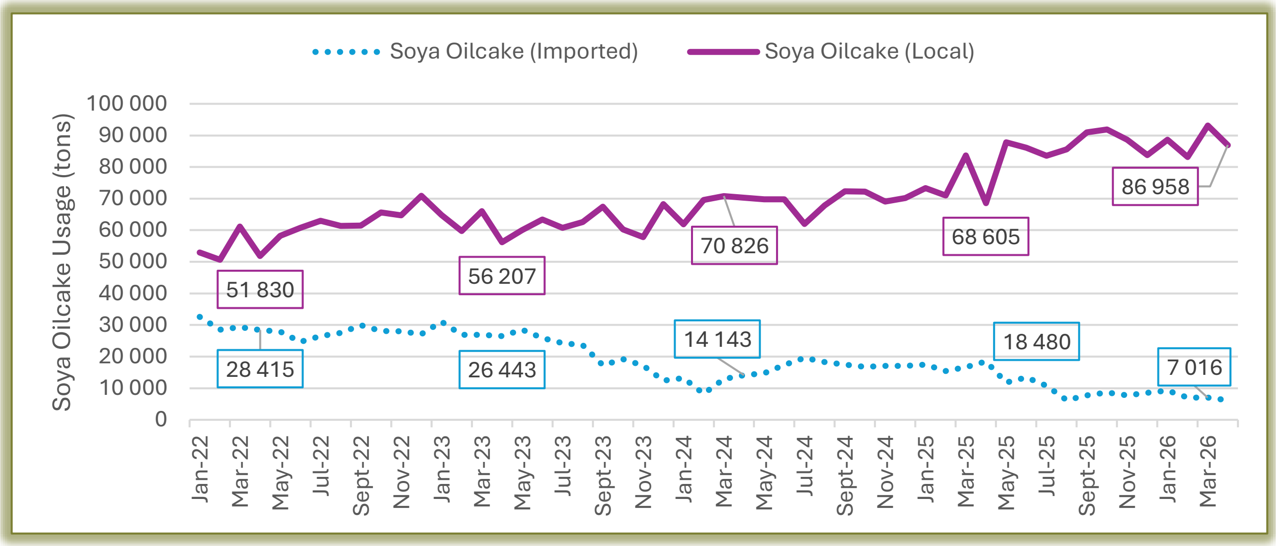


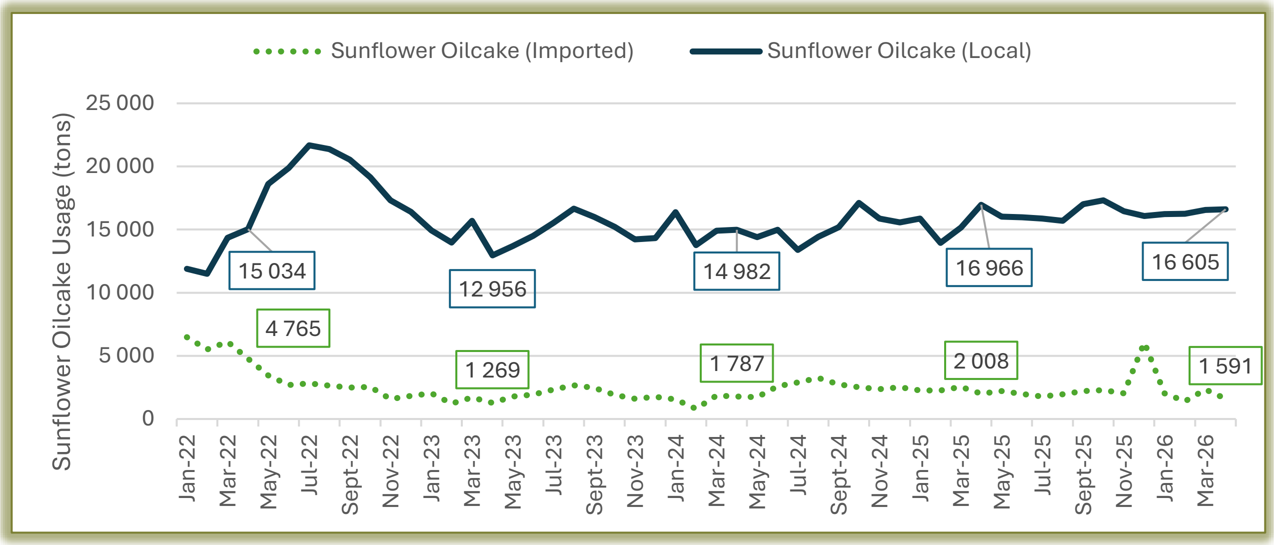
Other feed production declined from 1,314 tons to 1,090 tons, representing a 224-ton (-17.0%) month-on-month decrease. However, compared with 726 tons during April 2025, production increased substantially by 364 tons (+50.1%), indicating strong growth in specialised feed products.

Other feed categories continued to record robust growth during the reporting period. Production reached 4,663 tons, increasing by 690 tons (+17.4%) compared with 2025. Production also exceeded 2024 by 970 tons (+26.3%) and 2023 by 593 tons (+14.6%). The cumulative trend reflects continued diversification of feed manufacturing across specialised livestock sectors.

RAW MATERIAL USAGE







GRAIN MARKET DIGEST

Global oilseed production is raised slightly in July 2026 on higher South Africa and Canada soybean production, offsetting lower production for Brazil cottonseed. Global oilseed trade is raised on higher Canada rapeseed, EU sunflower seed, and U.S. soybeans. Global oilseed crush is up on higher China soybean and EU rapeseed crush. Global oilseed carryout is lowered on Canada rapeseed and U.S. soybean stocks.

Global soybean meal demand is the other major driver of Brazil's crushing growth. Exports of soybean meal are expected to reach a record 26.9 million tons in 2026/27, up 1.9 million from 2025/26. Brazil is the world's second largest exporter of soybean meal after Argentina, and over half of soybean meal production is exported. In 2026/27, global import demand for soybean meal is forecast to rise by 4 percent, led by strong growth for the European Union, Indonesia, Vietnam, Mexico, and Thailand. Brazil remains dependent on whole soybean trade to dispose of its crop, but the rapid development of domestic crush has opened additional demand segments domestically and internationally.

Brazil's soybean crushing is forecast at 65 million tons in 2026/27 (October – September), up 3.5 million tons from 2025/26. This surge continues an expansion that has averaged 5 percent growth over the last decade. A record crop and investments in crushing facilities, intended to supply rising demand for soybean oil and meal, are the primary drivers of the expansion. While nearly two-thirds of Brazil's crop is exported and processed abroad, growth in domestic processing has maintained pace with production. According to data from the Brazilian Association of Vegetable Oil Industries (ABIOVE), total active crushing capacity is estimated at 77 million tons in 2025, rising by nearly 30 percent since 2020.

Several new crushing facilities are expected to begin operations across Brazil in 2026 and 2027, in part to satisfy growing demand for feedstocks for production of biodiesel. Brazil's biodiesel blend mandate increased from B14 to B15 in mid-2025, and future steps toward B20 are planned under the country's Fuel the Future law. Soybean oil comprises nearly three-quarters of the fats and oils used to produce biodiesel in Brazil. Industrial consumption of soybean oil, which includes biofuel use, is forecast to increase by 300,000 tons to 7.3 million tons in 2026/27.

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