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## **Raw Materials Usage and Feed Production Returns**

**December 2016**

The Stockfeed Manufacturers Association raw materials procurement, feeds manufactured and average prices for the period January 2012 to December 2016 are summarised in the tables and graphs below.

Returns were collated from the following companies: Berghaan Feeds, Capital Feeds, Country Feeds, Feedmix, Fivet Animal Health, Hamara Feeds, Hyperfeeds, Ice Feeds, Irvine's Zimbabwe, Lake Harvest, Meadow Enterprises, Manyame Milling, National Foods Ltd, Profeeds, Triple C Pigs and Windmill.

Monthly procurement of raw materials and production of stockfeeds in the fourth quarter of 2016 averaged 44,678 and 44,731mt respectively, representing decreases of 11 and 13% respectively over the same period in 2015. The value of raw materials procured and feeds produced were \$16.1m and \$23.0m/month, respectively, which were decreases of 9% over the same period in 2015.

Maize and soya procurements during the fourth quarter constituted the bulk of raw material used, accounting for 67% of all raw materials procured by weight and 75% by monetary value. Average monthly procurement of maize and soya bean equivalent in the fourth quarter of 2016 were 18,878mt (worth \$6.3m) and 10,966mt/month (\$5.6m) respectively and represents growth for the quarter of -6% (6% in value) and -18% (-19% in value) over the same period in 2015, respectively.

Manufacture of poultry feeds continued to dominate the stockfeed industry during the fourth quarter of 2016 with a monthly average of 29,394mt (worth \$16.8m), a decrease of 10% in quantity and 9% in value over the same period in 2015. Poultry feeds accounted for 66% of all feeds produced by weight and 73% by monetary value. By comparison, pig and ruminant feeds accounted for 6% and 14% of the total value of feeds produced, respectively.

Over the period October to December, production of broiler starter, grower and finisher feeds decreased by 14, 0 and 2%, respectively, compared to the same period last year. Layer rearing and production feeds decreased by 37% and 28% respectively.

Except for wheat bran, urea and methionine, prices of raws procured in the fourth quarter of 2016 increased compared to prices in the third quarter. Average weighted broiler and layer feed prices in the fourth quarter were \$686 and \$481/mt, respectively, being 4 and 2% higher than prices in the third quarter of 2016. Prices of ruminant feeds showed the largest increase due to high cost and unavailability of cotton residues necessitating reliance on soya products for protein.

### Tonnages of Raws Procured - January 2012 to December 2016

Feed Raw Materials	Monthly Averages												Oct-Dec '16	
	2012	2013	2014	2015	2015				2016				compared to	
					Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Oct-Dec '15	Jul-Sep '16
Maize	14,352	15,934	16,987	17,937	14,436	18,547	18,746	20,019	18,391	19,605	18,898	18,878	-6%	0%
Soya beans	1,623	1,118	256	115	161	86	160	53	143	4	19	158		
Soya meal - FF	245	1,301	1,805	2,154	1,762	2,234	2,284	2,339	1,791	1,624	1,905	2,243	-4%	18%
Soya meal - ME	4,265	2,006	2,044	2,010	1,507	2,125	2,288	2,119	1,672	1,758	2,081	1,506	-29%	-28%
Soya meal - SE	1,558	3,786	4,388	5,603	4,894	5,588	5,884	6,047	5,332	5,631	4,764	4,826	-20%	1%
Total Soya (bean equivalent)	9,305	10,119	10,666	12,492	10,529	12,674	13,402	13,363	11,333	11,513	11,089	10,966	-18%	-1%
Wheat Bran	2,924	4,074	4,558	5,651	4,676	5,569	6,236	6,121	4,335	4,191	5,060	6,410	5%	27%
Maize Bran	1,885	2,276	3,219	4,415	3,557	4,147	4,330	5,626	4,114	3,819	3,873	3,714	-34%	-4%
Rice Bran												364		
Screenings												89		
Cotton cake < 30% CP	395	366	301	378	269	317	340	585	352	256	378	225	-62%	-40%
Cotton meal >30% CP	365	549	294	249	213	193	285	304	265	278	283	90	-70%	-68%
Cotton seed - Whole	112	145	153	305	171	225	375	452	360	1,231	421	371	-18%	-12%
Sunflower cake/meal	214	436	534	461	277	449	504	615	527	528	514	666	8%	30%
Molasses	486	927	995	1,474	998	1,228	1,501	2,168	1,272	1,059	1,315	1,488	-31%	13%
Citrus Pulp												72		
Urea	51	67	78	105	80	93	112	134	170	82	100	142	6%	43%
Salt	139	164	130	192	110	189	225	244	210	201	188	179	-27%	-5%
Cotton hulls	483	600	501	673	811	642	523	715	342	297	195	459	-36%	135%
Hay	37	45	118	184	82	87	289	279	163	150	281	426	53%	52%
MCP	241	168	178	165	151	159	173	178	168	180	167	229	28%	37%
Fine Limestone Flour	-	915	677	797	661	817	834	874	859	873	1,041	1,042	19%	0%
Coarse Limestone Flour	-	62	186	236	148	228	283	286	257	241	229	206	-28%	-10%
Methionine	33	32	38	33	32	31	36	31	51	38	39	45	43%	16%
Lysine	49	20	26	27	21	25	29	34	41	45	45	45	32%	-1%
Meat and Bone Meal	406	616	790	790	778	837	795	752	708	843	808	747	-1%	-8%
Fish Meal	181	89	99	100	70	109	126	93	85	74	66	43	-54%	-34%
<b>Totals</b>	<b>31,073</b>	<b>35,697</b>	<b>38,352</b>	<b>44,054</b>	<b>35,868</b>	<b>43,924</b>	<b>46,356</b>	<b>50,069</b>	<b>41,610</b>	<b>43,009</b>	<b>42,678</b>	<b>44,662</b>	<b>-11%</b>	<b>5%</b>

### Tonnages of Feeds Manufactured - January 2012 to December 2016

Production/Sales	Monthly Averages												Oct-Dec '16	
					2015				2016				compared to	
	2012	2013	2014	2015	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jun	Jul-Sep		Oct-Dec '15	Jul-Sep '16
<b>Poultry</b>														
Broiler Starter	2,835	3,352	4,147	4,149	3,836	4,006	4,388	4,368	3,274	3,499	3,685	3,753	-14%	2%
Broiler Grower	1,621	3,596	4,561	6,053	5,153	6,388	6,473	6,200	6,135	6,605	6,266	6,181	0%	-1%
Broiler Finisher	5,144	7,916	8,742	9,064	7,793	9,468	8,893	10,100	7,234	8,754	8,224	9,864	-2%	20%
Layer Rearing Feed	1,016	873	893	1,381	1,120	1,450	1,432	1,520	1,588	793	1,072	951	-37%	-11%
Layer Production Feeds	4,974	5,436	5,086	5,842	4,955	5,482	6,003	6,930	7,364	6,112	5,816	4,964	-28%	-15%
Poultry Breeder feeds	2,878	3,166	3,070	2,650	2,616	2,568	2,776	2,640	2,847	3,577	3,536	2,854	8%	-19%
Poultry Concentrates	959	1,046	1,385	1,468	1,356	1,581	1,855	1,081	649	798	1,034	828	-23%	-20%
<b>Dairy</b>														
Dairy meals	1,393	1,335	1,939	2,182	2,310	1,797	2,013	2,609	1,777	1,463	1,993	1,990	-24%	0%
<b>Beef</b>														
Beef Pen Fattening	2,483	3,281	4,470	5,978	4,978	3,940	6,375	8,620	3,521	2,731	5,166	6,923	-20%	34%
Beef Maintenance Feeds	632	605	761	1,022	299	566	835	2,386	567	364	903	1,527	-36%	69%
Beef Concentrates	319	151	77	573	28	1,569	638	55	1,246	2,001	374	33	-39%	
<b>Pig</b>														
Juvenile Feeds	408	389	301	366	290	336	412	424	817	327	346	261	-38%	-25%
Growing and Fattening feeds	1,420	1,363	1,619	1,374	1,160	1,462	1,457	1,417	2,300	1,917	1,918	1,545	9%	-19%
Pig Breeder Feeds	403	490	552	560	516	548	582	596	573	576	586	600	1%	2%
Pig Concentrates	239	496	99	464	227	559	564	504	898	489	609	426	-16%	-30%
<b>Fish</b>														
Aqua Feeds	1,189	1,100	1,293	1,225	1,382	1,174	1,375	968	1,211	1,277	979	891	-8%	-9%
<b>Sundry Feeds</b>														
Quail												38		
Road Runner												203		
Horse												33		
Dog												12		
All Other species feeds	514	523	745	883	745	892	981	916	1,043	1,681	1,028	854	-7%	-17%
<b>Totals</b>	<b>28,427</b>	<b>35,119</b>	<b>39,740</b>	<b>45,234</b>	<b>38,765</b>	<b>43,786</b>	<b>47,054</b>	<b>51,333</b>	<b>43,044</b>	<b>42,965</b>	<b>43,534</b>	<b>44,731</b>	<b>-13%</b>	<b>3%</b>
<b>Poultry feeds</b>														
Broiler	9,600	14,864	17,450	19,266	16,781	19,862	19,755	20,668	16,643	18,857	18,174	19,797	-4%	9%
Layer	5,990	6,309	5,980	7,223	6,075	6,932	7,435	8,450	8,952	6,905	6,888	5,915	-30%	-14%
Breeder	2,878	3,166	3,070	2,650	2,616	2,568	2,776	2,640	2,847	3,577	3,536	2,854	8%	-19%
Concentrates	959	1,046	1,385	1,468	1,356	1,581	1,855	1,081	649	798	1,034	828	-23%	-20%
Poultry - Total	19,427	25,385	27,885	30,608	26,828	30,943	31,821	32,839	29,091	30,138	29,632	29,394	-10%	-1%
Broiler day old chicks, millions	4.59	5.35	6.47	6.21	5.84	6.94	6.34	5.73	5.91	5.98	6.75	6.31	10%	-7%
Sexed pullets, thousands	210	180	171	255	253	297	277	191	145	149	167	123	-36%	-27%

### Prices of Raws Procured - January 2012 to December 2016

Feed Raw Materials	Monthly Averages												Oct-Dec '16
					2015				2016				compared to
	2012	2013	2014	2015	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Jul-Sep '16
Maize	274	350	364	316	342	315	306	301	304	314	333	338	2%
Soya beans	585	627	576	587	558	537	592	660	592				
Soya meal - FF	814	788	699	676	702	655	670	677	678	665	658	673	2%
Soya meal - ME	726	787	699	656	658	657	651	659	655	640	634	642	1%
Soya meal - SE	718	791	697	651	658	650	654	643	634	628	646	652	1%
Wheat Bran	180	192	183	176	176	163	164	201	184	181	178	170	-4%
Maize Bran	181	198	181	172	175	155	187	172	183	177	189	202	6%
Rice Bran												149	
Screenings												130	
Cotton cake < 30% CP	280	224	288	280	273	275	275	298	286	276	287	310	8%
Cotton meal >30% CP	365	356	349	412	422	411	408	408	402	375	393	434	10%
Cotton seed - Whole	291	273	310	309	289	303	322	323	296	292	332	348	5%
Sunflower cake/meal	430	496	497	484	495	501	484	457	486	463	503	513	2%
Molasses	136	125	128	141	144	144	139	138	138	143	145	161	11%
Citrus Pulp												153	
Urea	791	762	614	646	667	652	625	639	608	580	570	500	-12%
Salt	237	232	189	212	223	207	215	204	196	192	207	208	1%
Cotton hulls	96	117	114	132	114	119	120	176	170	173	183	191	5%
Hay	129	147	138	157	150	156	163	159	160	159	153	166	9%
MCP	949	838	739	752	753	762	758	734	713	736	721	717	-1%
Fine Limestone Flour		120	108	107	110	106	106	106	106	102	106	110	4%
Coarse Limestone Flour		151	148	153	163	155	147	146	138	135	136	136	0%
Methionine	5,299	4,454	4,393	5,065	4,815	4,875	5,346	5,225	5,109	5,163	5,043	4,585	-9%
Lysine	3,140	2,722	2,130	2,257	2,165	2,293	2,309	2,261	2,047	1,872	1,991	2,147	8%
Meat and Bone Meal	818	862	820	744	773	754	733	717	669	650	669	667	0%
Fish Meal	1,356	1,570	1,483	1,544	1,513	1,650	1,574	1,441	1,245	1,318	1,330	1,299	-2%

**Prices of Feeds Manufactured - January 2012 to December 2016**

	Monthly Averages												Oct-Dec '16
<b>Production/Sales</b>					2015				2016				compared to
<b>Poultry</b>	2012	2013	2014	2015	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Jul-Sep '16
Broiler Starter	557	678	667	632	657	649	617	605	611	607	608	634	4%
Broiler Grower	553	670	655	613	639	622	598	594	587	583	574	615	7%
Broiler Finisher	530	638	637	603	622	612	593	586	582	578	581	590	2%
Layer Rearing Feed	478	559	526	501	511	501	498	494	507	489	475	497	5%
Layer Production Feeds	480	556	527	498	509	503	489	492	490	480	471	478	2%
Poultry Breeder feeds	488	554	507	458	478	468	443	443	444	452	442	436	-1%
Poultry Concentrates	834	941	855	768	785	740	744	804	772	780	815	819	1%
<b>Dairy</b>													
Dairy meals	299	329	304	369	367	367	369	372	327	326	373	389	4%
<b>Beef</b>													
Beef Pen Fattening	209	265	256	255	262	255	252	252	256	258	254	296	16%
Beef Maintenance Feeds	276	250	267	257	254	257	260	257	307	293	269	295	10%
Beef Concentrates	290	339	219		229				196				
<b>Pig</b>													
Juvenile Feeds	602	638	607	615	634	625	613	588	563	587	615	662	8%
Growing and Fattening feeds	495	492	491	441	442	445	438	438	417	387	397	466	17%
Pig Breeder Feeds	437	486	447	426	423	420	436	423	429	425	440	451	2%
Pig Concentrates	654	680	704	658	662	659	654	659	665	659	658	671	2%
<b>Sundry</b>													
Quail												547	
Road Runner												522	
Horse												370	
Dog												743	
<b>Blended Prices of Poultry Feeds</b>													
Broiler	542	655	649	613	635	623	600	593	590	585	584	606	4%
Layer	480	556	527	499	509	502	491	492	493	481	472	481	2%



































