



Livestock & Meat Advisory Council

Exhibition Park, Samora Machel Ave West, P O Box BE 209, Belvedere, Harare

Phone: +263 (24) 2756 600, 2772 915, 2777 391

Email: admin@lit.co.zw

Market Watch First Quarter 2019

Poultry Sector

Broiler Breeding

Breeding stocks continue to increase after the outbreak of Avian Influenza in May 2017 and in the first quarter of 2019, broiler breeder stocks (growing and in-lay) averaged 730,753 birds per month, being 41 and 15% up on Q1 and Q4 of 2018 respectively.

Broiler Breeder Stocks

	2018				2019	% change
	Jan – Mar	Apr – Jun	Jul – Sep	Oct – Dec	Jan – Mar	
Female Parent Stock						
Chick Sales and Retentions	70,224	29,554	52,523	65,641	60,272	-8
Growing	235,371	298,895	263,511	284,629	323,024	13
In Production	281,594	268,530	347,463	351,564	407,729	16

Hatching egg production by local broiler breeders averaged 7.5 million per month in Q1 of 2019, being 36% higher than Q1 of 2018 and 5% down on Q4 of 2018. Reliance on imported hatching eggs to meet demand for broiler day-old chicks continues to decline and in Q1 of 2019 averaged 0.9 million per month, a reduction of 74 and 58% on Q1 and Q4 of 2018 respectively.

Total hatching eggs averaged 8.4 million per month in Q1, 6 and 17% down on Q1 and Q4 of 2018 respectively.

Hatching Eggs

	2018				2019	% change
	Jan – Mar	Apr – Jun	Jul – Sep	Oct – Dec	Jan – Mar	
Hatching Eggs, each						
Produced	5,474,263	4,643,372	5,767,567	7,855,552	7,466,696	-5
Imported	3,623,785	4,773,830	4,998,829	2,245,098	935,440	-58
Total	9,098,048	9,417,203	10,766,395	10,100,650	8,402,136	-17

Day Old Chicks

Sales and retentions were 9% down in the first quarter year on year and 19% down on the fourth quarter of 2018. Day old chick prices were 67% up on the first quarter of 2018, but a marginal 1% down on the preceding fourth quarter price.

Day Old Chicks

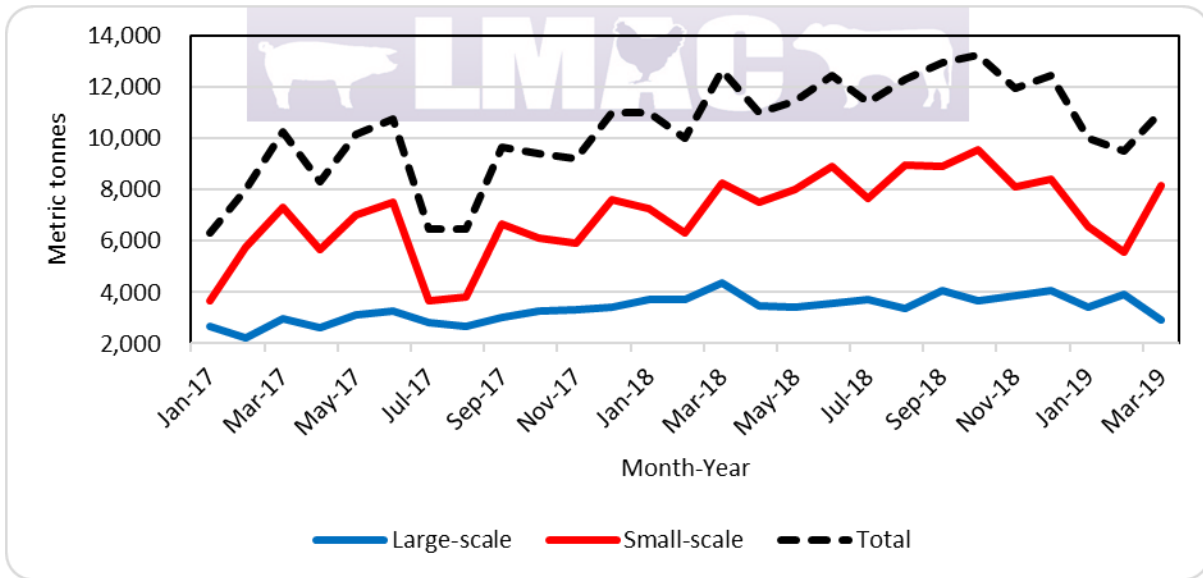
	2018				2019	% change
	Jan – Mar	Apr – Jun	Jul- Sep	Oct – Dec	Jan – Mar	
Day Old Chicks						
Chick Sales and Retentions	7,098,638	7,419,687	7,758,307	7,975,831	6,464,282	-19
Price per 100 chicks, RTGS	97.33	96.37	106.5	165.27	163	-1

Broiler Meat Production

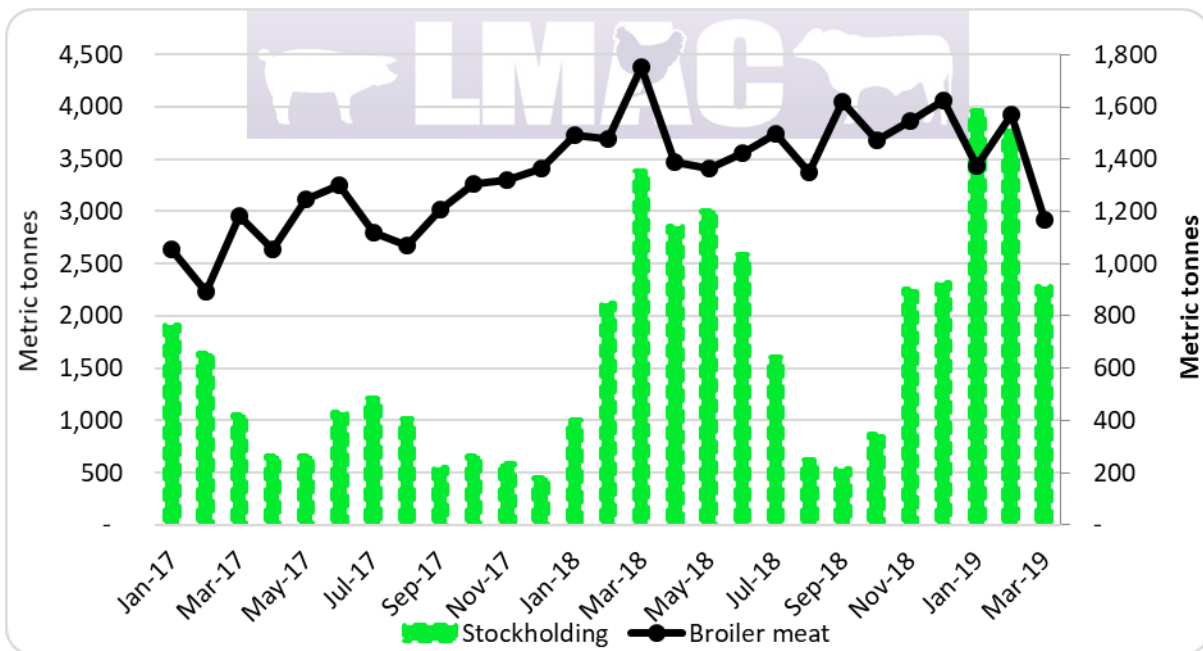
Estimated total broiler meat production in Q1 was 10,203mt per month, being 9 and 19% lower than that of Q1 and Q4 of 2018 respectively. Large-scale meat production in Q1 declined by 11% compared to Q4 of 2018, whereas small-scale production is estimated to have declined by 22%.

Broiler Meat Production

	2018				2019	% change
	Jan – Mar	Apr – Jun	Jul – Sep	Oct – Dec	Jan – Mar	
Large-Scale Broilers						
Number slaughtered	2,345,540	2,142,989	2,248,578	2,348,471	2,054,557	-13
Stock Holding (tonnes)	869	1,128	370	727	1,335	84
Average live weight	1.79	1.84	1.87	1.87	1.78	-5
Producer price, \$/kg	2.03	2.03	2.02	3.12	3.34	7
Total dressed weight, tonnes						
Large-scale	3,935	3,481	3,721	3,869	3,429	-11
Estimated Small-scale	7,278	8,163	8,521	8,694	6,774	-22
Total	11,213	11,644	12,242	12,563	10,203	-19



Broiler Meat Production, 2017 – March 2019



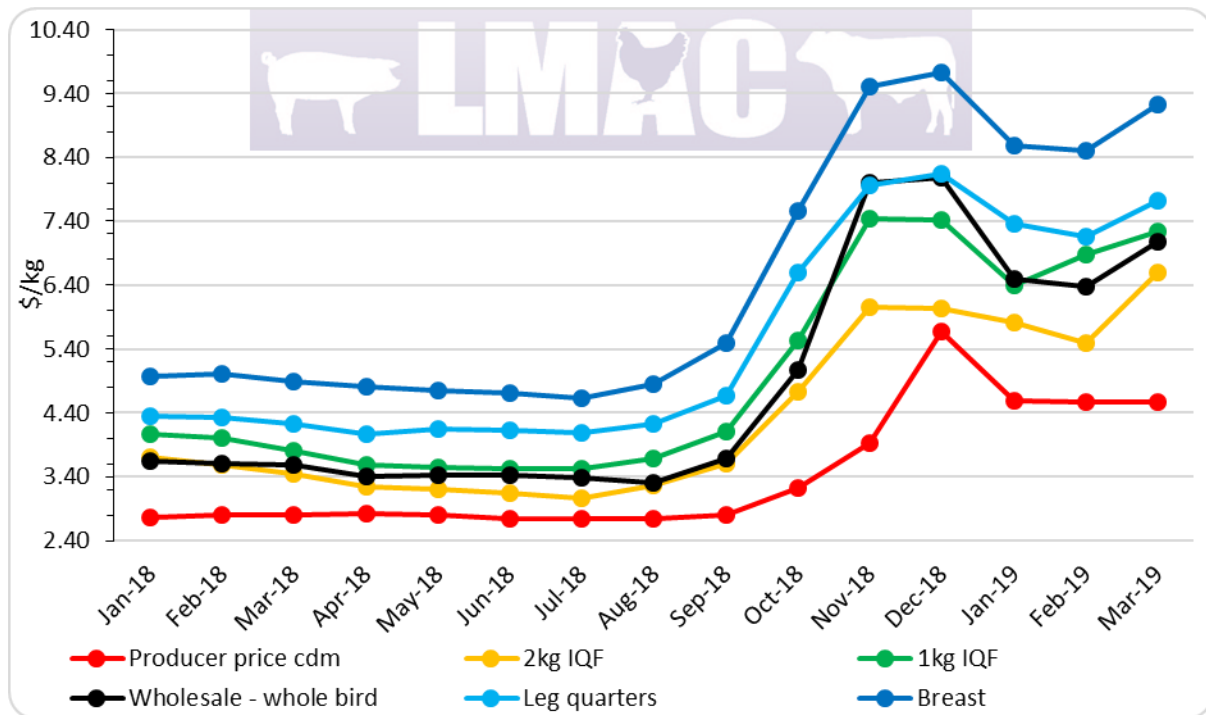
Large-scale Broiler Production and Stockholding, 2017 – March 2019

Broiler Meat Prices

In the face of rising costs, wholesale prices in Q1 remained similar to Q4 of 2018. However, the year-on-year prices of whole birds, leg quarters breast, 1 and 2kg IQF increased by 84, 72, 77, 73, and 67% respectively.

Wholesale Prices of Broiler Meat

Wholesale prices, \$/kg	2018				2019	% change
	Jan – Mar	Apr – Jun	Jul – Sep	Oct – Dec	Jan – Mar	
Whole bird	3.61	3.42	3.46	7.05	6.65	-6
Leg quarters	4.3	4.11	4.33	7.56	7.41	-2
Breast	4.95	4.75	4.99	8.93	8.77	-2
1kg IQF	3.96	3.55	3.77	6.8	6.84	1
2kg IQF	3.58	3.2	3.3	5.6	5.97	6



Broiler Meat Prices, 2018 – March 2019

Layer Breeding

Total layer breeder stocks (growing and in-lay) averaged 71,108 birds per month in Q1 of 2019, similar to Q4 and an increase of 113% over the same period in 2018.

Breeder Stocks

Female Parent Stock	2018				2019	% change
	Jan – Mar	Apr – Jun	Jul – Sep	Oct – Dec	Jan – Mar	
Chick Sales and Retentions	-	4,992	4,848	3,164	5,068	60
Growing	16,103	16,854	21,770	25,726	35,062	36
In Production	17,275	24,338	29,843	44,786	36,046	-20

Production of layer hatching eggs in Q1 averaged 840,590 per month, being 7% down on Q4 of 2018 but 146% higher than the same period last year.

Layer Hatching Eggs

	2018				2019	% change
	Jan - Mar	Apr – Jun	Jul – Sep	Oct – Dec	Jan – Mar	
Produced (ea)	342,074	436,845	621,491	902,054	822,590	-9
Imported (ea)	-	-	-	-	18,000	
Total (ea)	342,074	436,845	621,491	902,054	840,590	-7

Day Old Chicks

Day-old chick sales and retentions were 23% higher in the first quarter of 2019 than over the corresponding period in 2018. When compared with the last quarter of 2018, sales and retentions increased by 57%. Prices have also increased, registering a year on year rise in 2018 of 97% and a further rise of 20% in the first quarter of 2019

Layer Day Old Chicks

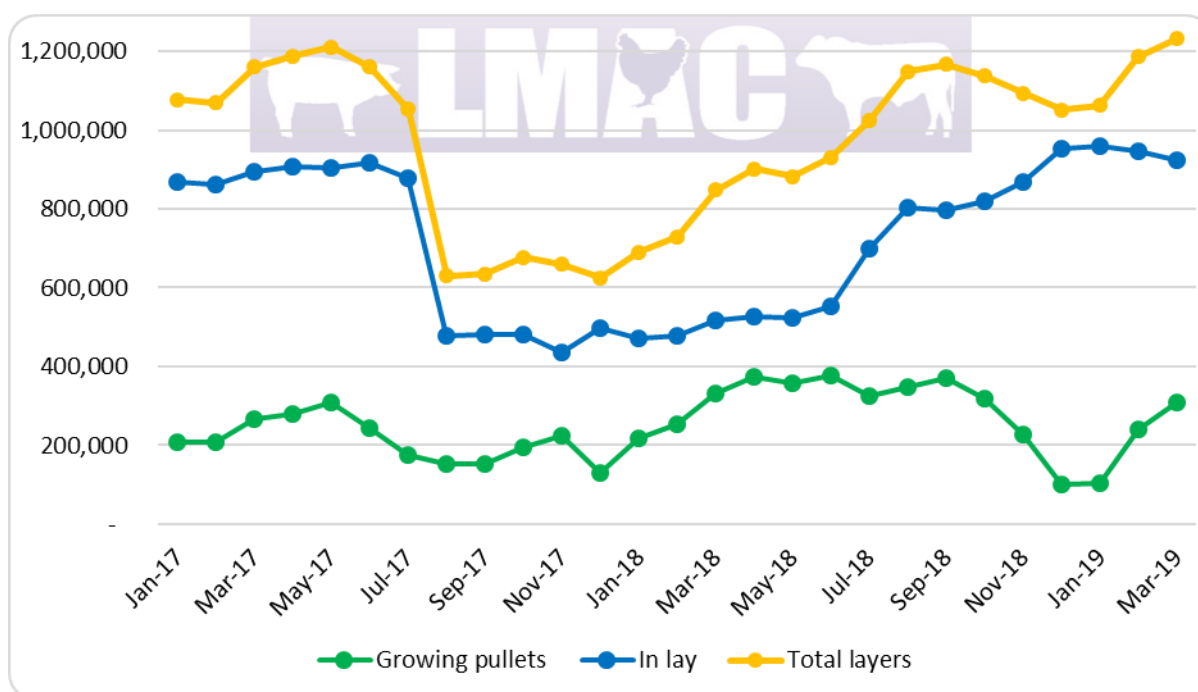
	2018				2019	% change
	Jan – Mar	Apr – Jun	Jul – Sep	Oct – Dec	Jan – Mar	
Chick Sales and Retentions	216,340	106,850	196,219	169,620	265,548	57
Price per 100 chicks, \$	133.44	142.78	170.83	219.61	263.25	20

Table Egg Production

Large-scale layer production stocks increased in Q1 registering a 6% quarter on quarter growth.

Large Scale Layer Production

	2018				2019	% change
	Jan – Mar	Apr – Jun	Jul – Sep	Oct – Dec	Jan – Mar	
Growing	268,064	369,903	347,944	214,786	217,723	1
In-lay	487,633	534,882	765,924	879,310	942,691	7



Large-scale Layer Production Stocks, 2017 – March 2019

However, large-scale table egg production increased by 27% in Q1 to 2.0 million dozen per month. Small-scale table egg production is estimated to have increased by 5% to 1.9 million dozen per month. Hence, total egg production is estimated to have increased by 15% to 3.9 million dozen per month (three eggs per capita per month). The wholesale price of table eggs increased by 10% and averaged \$6.96 per tray of 30 eggs.

Large Scale Table Egg Production

	2018				2019	% change
	Jan – Mar	Apr – Jun	Jul – Sep	Oct – Dec	Jan – Mar	
Large-scale	928,448	1,051,452	1,258,418	1,594,697	2,024,483	27
Small-scale	1,755,263	1,830,802	1,863,308	1,847,121	1,948,696	5
Total	2,683,711	2,882,255	3,121,726	3,441,818	3,973,178	15
Wholesale price per tray, \$	4.50	4.45	4.30	6.34	6.96	10
Stockholding (doz)	48,703	52,331	94,607	132,455	148,632	12

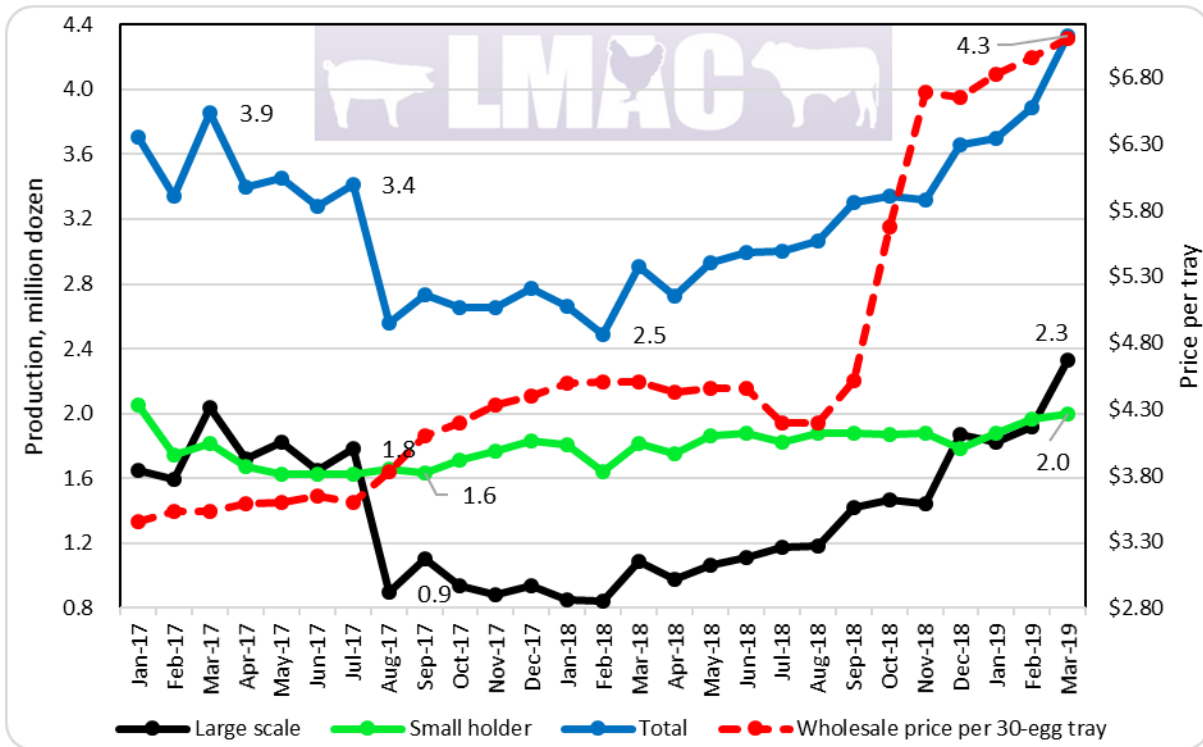


Table Egg Production and Wholesale Prices, 2017 – March 2019