

New report: Insights into Africa's chicken meat market

IndexBox has published its latest report on the chicken meat market in Africa, which amounted to \$11.4bn in 2018, jumping by 6.1% against the previous year. This figure reflects the total revenues of producers and importers (excluding logistics costs, retail marketing costs, and retailers' margins, which will be included in the final consumer price).



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The market value increased at an average annual rate of +1.8% over the period from 2013 to 2018; the trend pattern remained relatively stable, with only minor fluctuations being recorded in certain years. The pace of growth appeared the most rapid in 2017 when the market value increased by 8% year-on-year. Over the period under review, the chicken meat market reached its peak figure level in 2018 and is likely to see steady growth in the near future.

Consumption by country

The countries with the highest volumes of chicken meat consumption in 2018 were South Africa (2.1m tonnes), Egypt (1.1m tonnes) and Morocco (720k tonnes), with a combined 52% share of total consumption. Angola, Algeria, Ghana, Libya, Nigeria, Malawi, Tunisia, Congo and the Democratic Republic of the Congo lagged somewhat behind, together comprising a further 27%.

From 2013 to 2018, the most notable rate of growth in terms of chicken meat consumption, amongst the main consuming countries, was attained by Malawi, while chicken meat consumption for the other leaders experienced more modest paces of growth.

In value terms, the largest chicken meat markets in Africa were South Africa (\$3.3bn), Egypt (\$1.8bn) and Morocco (\$1.1bn), together accounting for 54% of the total market. Nigeria, Angola, Malawi, Libya, Ghana, Tunisia, Algeria, the Democratic Republic of the Congo and Congo lagged somewhat behind, together accounting for a further 24%.

The countries with the highest levels of chicken meat per capita consumption in 2018 were Libya (39 kg per person), South Africa (36 kg per person) and Congo (23 kg per person).

Market forecast to 2030

Driven by increasing demand for chicken meat in Africa, the market is expected to continue an upward consumption trend over the next decade. Market performance is forecast to retain its current trend pattern, expanding with an anticipated CAGR of +3.1% for the period from 2018 to 2030, which is projected to bring the market volume to 11m tonnes by the end of 2030.

Production in Africa

In 2018, the amount of chicken meat produced in Africa totalled 5.7M tonnes, surging by 4.2% against the previous year. The total output volume increased at an average annual rate of +2.4% over the period from 2013 to 2018. The general positive trend in terms of chicken meat output was largely conditioned by a moderate expansion of the number of producing animals and a relatively flat trend pattern in yield figures.

Production by country in Africa

The countries with the highest volumes of chicken meat production in 2018 were South Africa (1.8m tonnes), Egypt (1.1m tonnes) and Morocco (720K tonnes), with a combined 62% share of total production. Algeria, Nigeria, Malawi, Tunisia, Libya, Tanzania, Sudan and Mozambique lagged somewhat behind, together accounting for a further 21%.

From 2013 to 2018, the most notable rate of growth in terms of chicken meat production, amongst the main producing countries, was attained by Malawi, while chicken meat production for the other leaders experienced more modest paces of growth.

Imports in Africa

In 2018, approximately 1.9m tonnes of chicken meat were imported in Africa; picking up by 23% against the previous year. In value terms, chicken meat imports amounted to \$1.9bn, [IndexBox](#) estimates, in 2018. In general, chicken meat imports continue to indicate a relatively flat trend pattern. The pace of growth appeared the most rapid in 2018 when imports increased by 21% against the previous year. The level of imports peaked at \$2bn in 2013; however, from 2014 to 2018, imports remained at a lower figure.

Imports by country

Angola (432k tonnes) and South Africa (370k tonnes) represented the major importers of chicken meat in 2018, accounting for near 23% and 20% of total imports, respectively. Ghana (213k tonnes) ranks next in terms of the total imports with a 12% share, followed by Libya (6.6%), Congo (6.2%) and Democratic Republic of the Congo (5.8%). Benin (77k tonnes), Gabon (67k tonnes), Egypt (45k tonnes) and Guinea (37k tonnes) followed a long way behind the leaders.

From 2013 to 2018, the most notable rate of growth in terms of imports, amongst the main importing countries, was attained by Guinea, while imports for the other leaders experienced more modest paces of growth.

In value terms, Angola (\$465M), South Africa (\$372M) and Ghana (\$188M) appeared to be the countries with the highest levels of imports in 2018, together accounting for 53% of total imports. Libya, Democratic Republic of the Congo, Congo, Egypt, Benin, Gabon and Guinea lagged somewhat behind, together comprising a further 31%.

Import prices by country

The chicken meat import price in Africa stood at \$1,038 per tonne in 2018, approximately reflecting the previous year. Overall, the chicken meat import price continues to indicate a pronounced decline. The pace of growth was the most pronounced in 2017 an increase of 9.1% against the previous year. The level of import price peaked at \$1,266 per tonne in 2013; however, from 2014 to 2018, import prices stood at a somewhat lower figure.

Prices varied noticeably by the country of destination; the country with the highest price was Egypt (\$1,705 per tonne), while Congo (\$835 per tonne) was amongst the lowest.

From 2013 to 2018, the most notable rate of growth in terms of prices was attained by South Africa, while the other leaders experienced a decline in the import price figures.

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