Poultry meat production in Argentina has risen to meet domestic demand, and with a government announcement of ARS$ 2 billion (US$ 20 million) in subsidised loans for the sector, improvements in productivity are expected. Production of poultry meat in Argentina has risen to meet domestic demand, which continued to grow during the recession years (2018-2020) in response to rising beef prices. In 2022, chicken meat production is forecast at 2.3 million metric tonnes (mmt), up only slightly from 2021 estimates of 2.290 mmt (a 3.3% increase from 2020). In Argentina, upwards of 80% of chicken meat production is processed in 54 federally-inspected plants. The remaining production is produced at 40 additional plants that are monitored and restricted by provincial authorities for domestic sale only. Commercial broilers are slaughtered at 49-51 days at a carcass weight 2.2 to 2.4 kg. About 950 million birds are slaughtered annually. Existing slaughter capacity should allow for increased production of up to 2.45 mmt.

In July 2021, the Argentine government announced ARS$ 2 billion (US$ 20 million) in subsidised loans for the Argentine poultry sector to improve productivity. Interest rates for these loans run at 22-24%, far below the annual rate of inflation which the central bank of Argentina officially estimates at 51.8%. It is expected that those poultry producers who take advantage of these loans will use them to replace aging barns with new, modernised poultry barns. Just 10% of Argentine chickens are currently produced in barns that utilise a full complement of modern chicken rearing technology. If these loans are properly administered and made available as intended, that percentage could rise to as high as 50% by the end of 2024. The impact of the programme could begin to be felt in mid-2022 and early 2023. Outside of this new government loan programme, productivity growth remains restrict.

Domestic consumption of chicken in 2022 is forecast down 1% to 2.13 mmt as flat growth in production combined with simpler shipping logistics will enable exporters to ship more chicken meat overseas and an improving economy will allow Argentines to consume more of their traditionally preferred protein, beef, at the expense of chicken. Poultry meat consumption in 2021 is estimated at 2.15 mmt, up 4% from 2020. As the Argentine economy has begun to recover from a decline of nearly 10% in 2020, chicken prices have risen more slowly than beef. Higher production and lower exports have helped keep chicken prices low, encouraging consumption growth. Argentina’s Ministry of Agriculture, Livestock and Fisheries estimates that the annual per capita protein intake in Argentina in 2020 was 50.2 kg of beef, 45.9 kg of poultry, and 15.6 kg of pork.

WHOLE BROILERS REPRESENT 70% OF DOMESTIC CHICKEN MEAT CONSUMPTION. FURTHER PROCESSED VALUE-ADDED PRODUCTS (E.G. PRE-COOKED MEALS, FROZEN CHICKEN MEALS, CHICKEN NUGGETS AND CHICKEN BURGERS) REPRESENT GROWTH OPPORTUNITIES. THE ARGENTINE POULTRY INDUSTRY HAS HIGHER COSTS THAN SOME OF ITS COMPETITORS, HOWEVER, EXPORT TAXES ON FEED INGREDIENTS PROVIDE AN ADVANTAGE TO THE INDUSTRY.

2022 Argentine chicken meat imports are forecast at 10,000 mt, on par with expected 2021 levels. Since 2001, imports have represented less than 1% of the total supply of Argentine poultry meat. Brazilian, Uruguayan, and Paraguayan chicken meat (fresh, chilled, or frozen whole birds, cuts, and offals) and prepared poultry products (preserved, seasoned, and pre-cooked products) enter Argentina tariff-free as a Mercosur pact member while other exporters face external Mercosur tariffs of 10% and 16%, respectively. Brazil continues to dominate the small Argentine import market, while Uruguay sends small volumes.
The kwacha will likely trade on the back foot against the dollar next week as demand for hard currency remains higher than supply. On Thursday, commercial banks quoted the currency of Africa's second-largest copper producer at 16.7147 per dollar from a close of 16.5500 a week ago. “There is very high demand from importers, which is not being matched with supply of dollars into the market,” one commercial bank trader said. On the other hand, Zambian inflation slowed to an eight-month low in September after food-price growth decelerated from a record high and the currency's two-month world beating streak helped curb import costs. Consumer prices rose 22.1% from a year earlier, compared with 24.4% in August, Zambia's interim statistician-general, Mulenga Musepa, told reporters Thursday in Lusaka, the capital. Costs fell 0.5% in the month. Food-price growth slowed to 29.6% in September, compared to 31.6% in the prior month, and non-food inflation decelerated to 13.6% from 16.3% in August.

The slowdown in inflation that has been above the 8% upper limit of the central bank’s target band for more than two years could ease pressure on the monetary policy committee to tighten and give it room to support the economy’s recovery, when Governor Denny Kalyalya chairs his first meeting in November since being reappointed on Monday. The central bank held its key interest rate at its most recent monetary policy committee meeting and projects inflation will decelerate faster and edge closer to the target range of 8% to 8% sooner than expected at its previous gathering. The MPC sees price growth averaging 22.6% this year, 15.5% in 2022 and 11.9% in the first half of 2023. The main risks to inflation include energy costs and the kwacha that weakened almost 5% in September against the dollar after a two-month world beating streak. The Finance Ministry expects the economy to grow 1.6% this year, compared with the International Monetary Fund’s forecast of 0.6% expansion, after contracting the most in more than two decades in 2020 to 2.8%. Gross domestic product expanded 8.1% in the second quarter from a year earlier. Source: https://www.bloomberg.com/news/articles/2021-09-30
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The prices for the Point of Lay remained stable the fifth week of September 2021. The average price is now averaging ZMK30, with the lowest being ZMK25 per bird bulk consignments and the highest being ZMK40 per bird for small volumes depending on the supplier and location. The bookings for September, October, November and December are available. Supply booking for pullets are still available in the market but for February and March delivery.

For the beginners who are interested in getting battery cages, cage prices range between ZMK800 to ZMK25,000 depending on the capacity and also the sources of the cages. The fifth hand refurbished cage price range between ZMK4800 to ZMK5200 depending on the quality, capacity, age and source. Quails cages, Rabbit Cages as well as fifth hand layers cages are all available on the market with differing prices depending on the source and location.

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The average price for the whole frozen chicken in Lusaka traded at about ZMK55.21 per kg same price as obtained last week. The lowest price in some chainstores is still trading at ZMK52.99 per kg due to promotions being undertaken while the highest is trading at ZMK58.71 per kg. The chicken sizes are ranging between 1kg to 1.8kg in different stores. Please note that the prices are obtained from Pick n Pay, Shoprite, Zambeef, Melissa Supermarket, Choppies and Cheers Stores. Different outlets have different pricing models hence the figures displayed is an average price for all the sampled chainstores. It should also be noted that these are Lusaka prices only. For the price trend, check figure 3 on the next page, courtesy of PAZ.

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The egg prices in the domestic market continued to be under pressure as supply outstrips demand. The retail prices in open markets is still ranging between ZMK 49.9 to ZMK 69.99 per tray of 30 eggs. Further, retail prices in some Chain stores did not register any movement with the prices averaged between ZMK 19.89 to ZMK 23.99 per tray of 30 eggs depending on the supplier, packaging and the chain stores. Most of the traders in the open market are now selling an egg between ZMK 2 to ZMK 2.5 in some markets. On the other hand, supply of egg trays seems to be on the increase but price still remains very high averaging ZMK 180 to ZMK 200 per bundle of 100 trays. For the price trend refer to figure 5, courtesy of PAZ.

**FEED PRICES REMAINS STABLE**

The national average prices for the poultry feed remained stable during the fifth week of September. Broiler starter is still trading at ZMK 49.19 per 50kg bag same price as was obtaining last week. Broiler Grower averages ZMK 50 while Broiler finisher also averages ZMK 50.16 per 50kg bag. In the same vain there were no movements registered on the Layer feed. The prices ranges from ZMK 385 for pullet starter, ZMK 324 for pullet grower, ZMK 287 for pullet developer and ZMK 311.37 for layers mash. For those compounding their own feed, ingredients prices have have also been stable during the week as portrayed in the graphs from 6 to 9 below, courtesy of PAZ.
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Figure 9: Average Prices for Sunflower Cake and #3 Meal - OCTOBER 2021

Figure 10: AVERAGE FISH MEAL PRICES - OCTOBER 2021

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