

Private Sector Perspective on Export Market Access for Poultry Meat

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About our company:

- **3RD BIGGEST INTEGRATED POULTRY PRODUCER IN SOUTH AFRICA
SLAUGHTERING AN AVERAGE OF 2,2 MILLION BIRDS A WEEK**
- **PRODUCTION FROM BREEDER FARMS THROUGH TO PROCESSING – INCLUDING FEED**
- **EXPORTING POULTRY MEAT PRODUCTS TO AFRICA (SADC) AND MIDDLE EAST**
- **COMMITMENT TO FOOD SAFETY, ANIMAL HEALTH, BIOSECURITY AND INTERNATIONAL STANDARDS**

About our South African Poultry Industry:

- **2ND MOST COST COMPETITIVE POULTRY INDUSTRY IN THE WORLD – WITH LIMITED EXPORT MARKET ACCESS.**



Discussion Points



- **EXPORT CERTIFICATION PROCESSES IN SOUTH AFRICA**
- **ANIMAL DISEASE-RELATED TRADE CONSTRAINTS**
- **EXPERIENCES WITH COMPARTMENTALIZATION**
- **CHALLENGES IN ACCESSING EXPORT MARKETS**
- **PRACTICAL APPLICATION OF WOAH STANDARDS**
- **RECOMMENDATIONS FOR IMPROVING MARKET ACCESS**

Importance of Poultry Exports from South Africa

WHY EXPORTS MARKETS MATTER

- **SUPPORT GROWTH BEYOND DOMESTIC DEMAND**
- **CREATE EMPLOYMENT THROUGHOUT THE VALUE CHAIN**
- **DRIVE INVESTMENT IN BIOSECURITY AND FOOD SAFETY SYSTEMS**
- **DIVERSIFY REVENUE STREAMS AND IMPROVE INDUSTRY RESILIENCE**

INDUSTRY REALITY

- **SOUTH AFRICAN PRODUCERS CAN OPERATE IN HIGHLY COMPETITIVE GLOBAL MARKETS**
- **COMPLIANCE COSTS CONTINUE TO INCREASE**
- **VERY LIMITED EXPORT MARKET ACCESS**
- **MARKET ACCESS IS OFTEN MORE CHALLENGING THAN MARKET MAINTENANCE**



Export Certification Challenges



CERTIFICATION IS CRITICAL FOR MARKET ACCESS

SOUTH AFRICAN POULTRY EXPORTERS DEPEND ON VETERINARY HEALTH CERTIFICATES ISSUED BY THE DEPARTMENT OF AGRICULTURE.

CURRENT CHALLENGES

- **GROWING NUMBER OF EXPORT MARKETS SEEKING BESPOKE CERTIFICATION CONDITIONS**
- **COUNTRY-SPECIFIC REQUIREMENTS OFTEN DIFFER SIGNIFICANTLY FROM WOAH RECOMMENDATIONS**
- **EXTENSIVE ADMINISTRATIVE BURDEN ON BOTH EXPORTERS AND VETERINARY AUTHORITIES**
- **LIMITED HARMONIZATION BETWEEN IMPORTING COUNTRIES**
- **LENGTHY NEGOTIATION AND APPROVAL PROCESS**

IMPACT

- **INCREASE COMPLIANCE COSTS**
- **DELAYED MARKET ACCESS**
- **REDUCED COMPETITIVENESS OF SOUTH AFRICAN POULTRY EXPORTERS**

Animal Disease Constraints

KEY DISEASE CHALLENGES AFFECTING POULTRY TRADE

HIGHLY PATHOGENIC AVIAN INFLUENZA (HPAI)

- **SIGNIFICANT IMPACT ON EXPORT OPPORTUNITIES**
- **IMMEDIATE MARKET CLOSURES IN MANY DESTINATIONS FOLLOWING OUTBREAKS**
- **RESTRICTIONS OFTEN APPLY BEYOND AFFECTED REGIONS/COMPARTMENTS.**

TRADE CONSEQUENCES

- **SUSPENSION OR LOSS OF EXPORT MARKET**
- **ADDITIONAL CERTIFICATION REQUIREMENTS**
- **INCREASED SURVEILLANCE AND TESTING OBLIGATIONS**
- **UNCERTAINTY FOR LONG-TERM PLANNING**



Compartmentalization as a Trade Facilitation Tool



BENEFITS OF COMPARTMENTALIZATION

COMPARTMENTALIZATION ENABLES TRADE CONTINUITY BY:

- **DEMONSTRATING ROBUST BIOSECURITY SYSTEMS**
- **MANAGING DISEASE RISK AT ENTERPRISE LEVEL**
- **SUPPORTING SAFE TRADE DURING REGIONAL DISEASE EVENTS**
- **ALIGNING WITH WOAH RECOMMENDATIONS**

INDUSTRY EXPERIENCE

WHILE COMPARTMENTALIZATION IS RECOGNIZED WITHIN WOAH STANDARDS:

- **NOT ALL TRADING PARTNERS ACCEPT COMPARTMENTS SYSTEMS**
- **RECOGNITION PROCESS DIFFER CONSIDERABLY BETWEEN COUNTRIES.**
- **ADDITIONAL EVIDENCE REQUIREMENTS ARE FREQUENTLY REQUESTED – WITH NO CONSISTENCY**

RESULT: THE PRACTICAL VALUE OF COMPARTMENTALIZATION IS REDUCED WITH IMPORTING COUNTRIES WHO DO NOT FULLY RECOGNIZE THE SYSTEM



Market Access Challenges Beyond WOH Standards

INCREASING DIVERGENCE FROM INTERNATIONAL STANDARDS

MANY IMPORTING COUNTRIES APPLY REQUIREMENTS THAT EXCEED WOH RECOMMENDATIONS

EXAMPLES INCLUDE:

- **ADDITIONAL DISEASE FREEDOM PERIODS**
- **EXPANDED SURVEILLANCE REQUIREMENTS**
- **ADDITIONAL ESTABLISHMENT APPROVALS**
- **ENHANCED RESIDUE MONITORING REQUIREMENTS**

CONSEQUENCES

- **DUPLICATION OF WORK**
- **INCREASED COSTS**
- **SLOWER MARKET ACCESS**
- **REDUCED PREDICTABILITY FOR EXPORTERS**



Case Study - United Kingdom Market Access Application



SOUTH AFRICA'S POULTRY EXPORT APPLICATION TO THE UK

ACTIONS COMPLETED:

- **UK QUESTIONNAIRE SUBMITTED BY SOUTH AFRICAN AUTHORITIES**
- **SUPPORTING NATIONAL RESIDUE MONITORING PLAN SUBMITTED**
- **EXTENDED RESIDUE MONITORING PLAN SUBMITTED**
- **TECHNICAL REQUIREMENTS ADDRESSED**

UK AUDIT

- **AUDIT CONDUCTED FROM 13 TO 23 MAY 2025**
- **HOSTED BY SOUTH AFRICAN COMPETENT AUTHORITIES**
- **INDUSTRY PARTICIPATION PROVIDED WHERE REQUIRED**

Case Study - Challenges Experienced



TIMELINE FOLLOWED AUDIT

- **CONTINUOUS FOLLOW-UP CONDUCTED OVER APPROXIMATELY 14 MONTHS**
- **NO AUDIT REPORT SHARED**
- **NO FORMAL FINDINGS ISSUED**
- **NO CORRECTIVE ACTIONS REQUESTED**

FEEDBACK RECEIVED

THE ONLY FEEDBACK PROVIDED WAS:

- **THE UK AND EU WERE RENEGOTIATING SPS REQUIREMENTS, AND SITES ALREADY COMPLETED WOULD BE PLACE ON HOLD.**

OUTCOME:

- **NO CONCLUSIVE DECISION RECEIVED**
- **NO AUDIT REPORT ISSUED**
- **STATUS OF THE APPLICATION REMAINS UNCLEAR**

Case Study - Private Sector Concerns



KEY CONCERN ARISING FROM THE UK EXPERIENCE

LACK OF PREDICTABILITY

REGULATORY UNCERTAINTY

TRANSPARENCY CHALLENGES

RESOURCE BURDEN

BUSINESS IMPACT

Views on WOAH standards



STRENGTHS OF WOAH STANDARDS

- **BASED ON SCIENTIFIC PRINCIPLES**
- **Globally recognized framework**
- **SUPPORT RISK-BASED TRADE**
- **PROVIDES MECHANISM SUCH AS COMPARTMENTALIZATION**

CHALLENGES

- **INCONSISTENT ADOPTION BY IMPORTING COUNTRIES**
- **ADDITIONAL REQUIREMENTS FREQUENTLY IMPOSED**
- **LIMITED PRACTICAL RECOGNITION OF COMPARTMENTALIZATION**
- **VARIABLE INTERPRETATION OF DISEASE RISK**

INDUSTRY VIEW : WOAH STANDARDS REMAIN FIT FOR PURPOSE, BUT GREATER INTERNATIONAL ALIGNMENT AND CONSISTENT IMPLEMENTATION ARE NEEDED.

Key Recommendations:

- **FOR TRADING PARTNERS**

**GREATER RELIANCE ON WOH STANDARDS
MORE TRANSPARENT MARKET ACCESS PROCESSES
DEFINED TIMELINES FOR APPLICATION REVIEW AND AUDITS
RECOGNITION OF COMPARTMENTALIZATION SYSTEMS.**

- **FOR REGULATORY AUTHORITIES**

**IMPROVE HARMONIZATION OF CERTIFICATION REQUIREMENTS
INCREASED ENGAGEMENT WITH INDUSTRY
RISK-BASED RATHER THAN PRECAUTIONARY TRADE MEASURES**

- **FOR INTERNATIONAL ORGANIZATIONS**

**ENCOURAGE CONSISTENT IMPLEMENTATION OF WOH STANDARDS
PROMOTE ACCEPTANCE OF SCIENCE-BASED TRADE MEASURES.**



Conclusion



KEY TAKEAWAYS

1. **EXPORT CERTIFICATION REMAINS ESSENTIAL BUT INCREASINGLY COMPLEX**
2. **ANIMAL DISEASES CONTINUE TO CREATE SIGNIFICANT TRADE BARRIERS**
3. **COMPARTMENTALIZATION IS A VALUABLE TOOL BUT REQUIRES BROADER INTERNATIONAL RECOGNITION**
4. **DIVERGENCE FROM WOAH STANDARDS UNDERMINES PREDICTABLE TRADE**
5. **THE UK CASE HIGHLIGHTS CONCERNS REGARDING TRANSPARENCY, TIMELINESS AND CERTAINTY IN MARKET ACCESS DECISIONS.**

FINAL MESSAGE

SOUTH AFRICAN POULTRY EXPORTERS SUPPORT SCIENCE-BASED TRADE AND THE PRINCIPLES OF WOAH. GREATER HARMONIZATION, TRANSPARENCY AND TIMELY REGULATORY DECISION-MAKING ARE ESSENTIAL TO UNLOCK EXPORT GROWTH AND MAINTAIN CONFIDENCE IN INTERNATIONAL MARKET ACCESS PROCESSES.

THANK YOU

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