



agriculture

Department:
Agriculture
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Food and Beverages Quarterly Brief: No. 3, 2025

Directorate: Agro-processing Support

Highlights of third quarter of 2025 (2025: Q3) (July to September)

In 2025: Q3, the quarter-to-quarter consumer price index for all items grew the same by 1,1% as compared to the last quarter; similarly, the producer price index for all items grew by 0,9% same as the last quarter.

In 2025: Q3, the quarter-to-quarter seasonally adjusted volume of production for the food division receded further by 0,2% as compared to a 1,3% contraction in the preceding quarter.

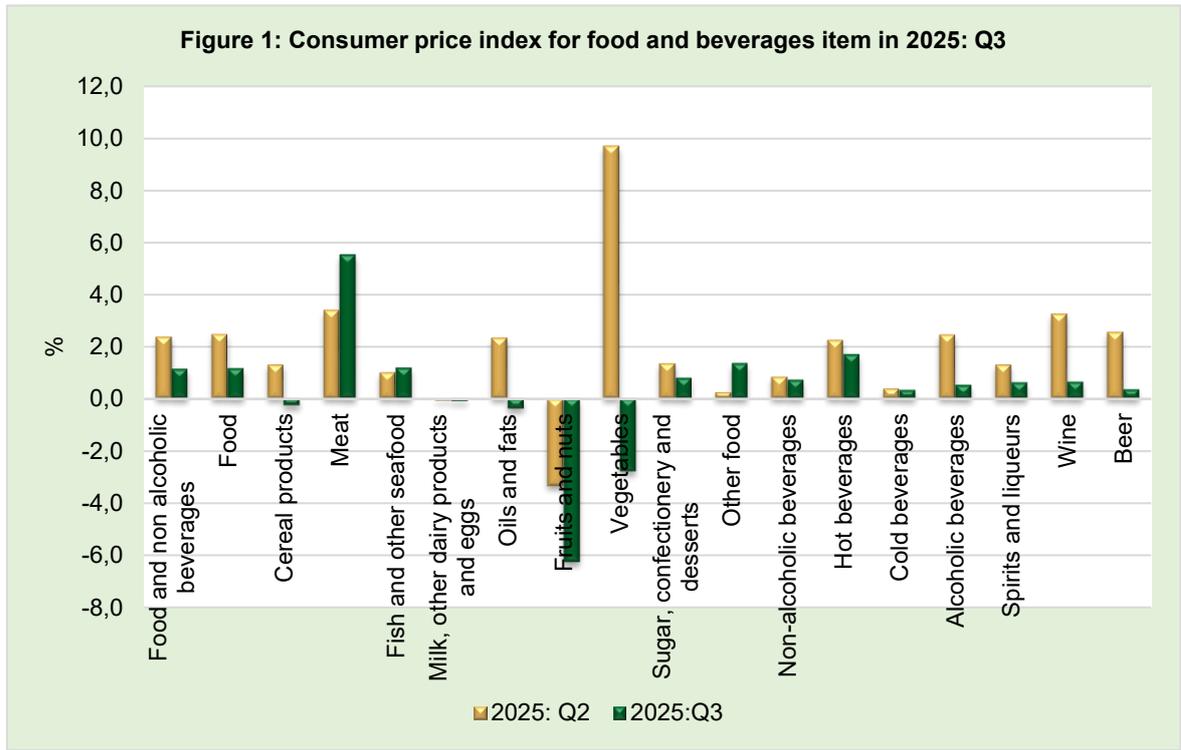
The nominal value of sales for the food division decreased from R171 308,3 million in the previous quarter to R170 516,1 million in the current quarter, translating to a contraction of 0,5% in 2025: Q3.

The nominal value of sales for the beverages division, however, rose by 4,6% quarter-to-quarter, representing an increase in nominal value to R54 608,6 million in 2025: Q3 from R57 129,1 million in 2025: Q2.

The trade surplus for the food division narrowed from R3 651,2 million in the last quarter to R2 151,1 million in the current quarter. The trade surplus for the beverages division, however, widened from R2 873,9 million in 2025: Q2 to R3 081,1 million in 2025: Q3.

In 2025: Q3, the quarter-to-quarter employment in the food products division contracted by 1,7% following a 2,2% growth in the last quarter; however, employment in the beverages and tobacco division remained unchanged as compared to a contraction of 28,0% in 2025: Q2.

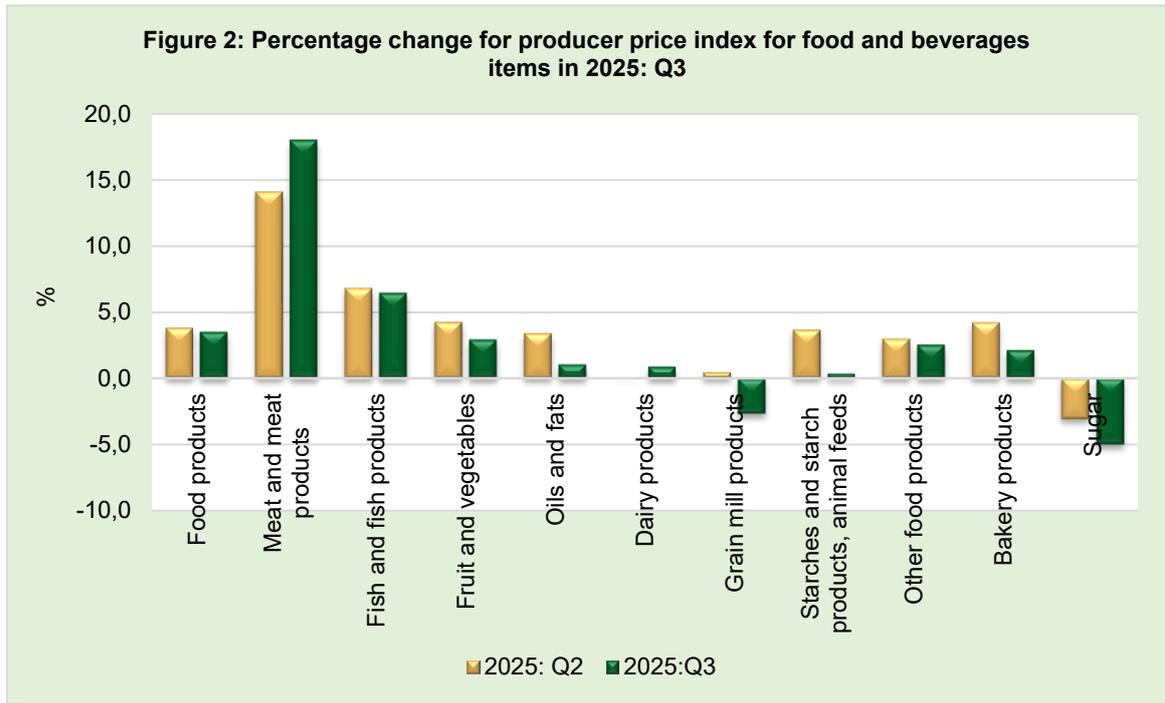
1. Consumer prices



Source: Statistics SA, 2025

Figure 1 above shows the consumer price index for food items in 2025: Q2 and 2025: Q3. In 2025: Q3, the quarter-to-quarter consumer price index for all items grew the same as last quarter by 1,1%. Most items moderated quarter-to-quarter, and those items were: food and non-alcoholic beverages (1,1%), food (1,2%), sugar, confectionery and desserts (0,8%), non-alcoholic beverages (0,7%), hot beverages (1,7%), cold beverages (0,3%), alcoholic beverages and tobacco (0,5%), alcoholic beverages (0,5%), non-alcoholic beverages (0,7%), spirits and liqueurs (0,6%), wine (0,6%) and beer (0,6%). However, meat (5,5%), fish; and other seafood (1,2%) expanded, cereal products (0,3%), oils and fats (6,3%) and vegetables (2,8%) contracted, while milk, other dairy products and eggs (0,1%) contracted further, and fruits and nuts (6,3%) decelerated in 2025: Q3.

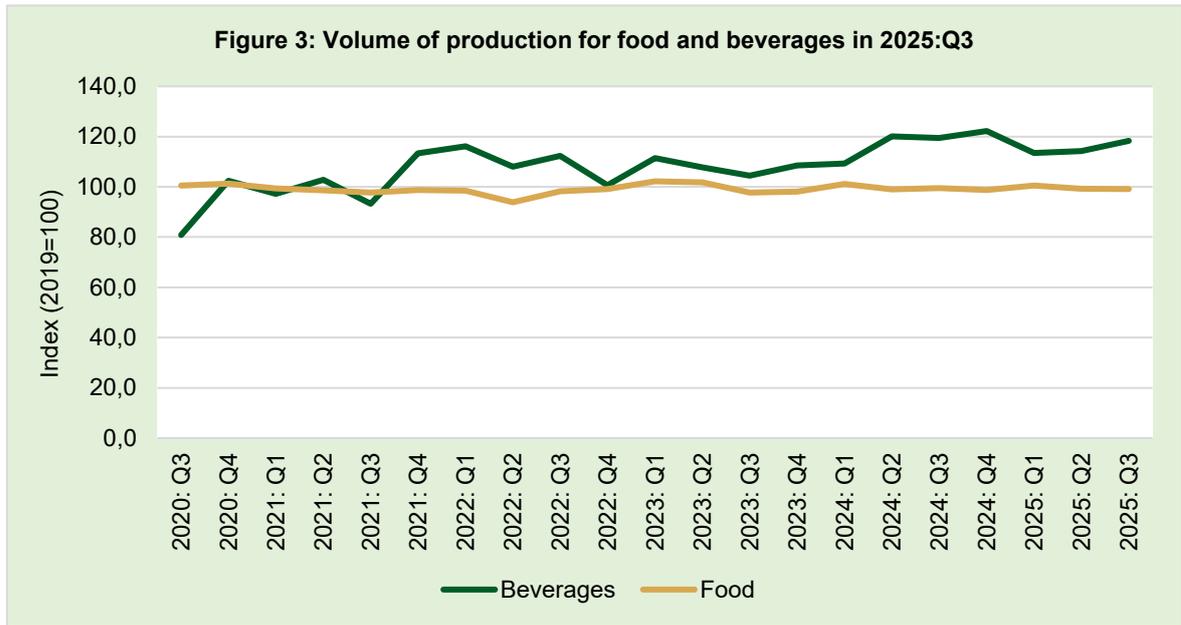
2. Producer prices



Source: Quantec, 2025

The producer price index for food and beverages is depicted in Figure 2. In 2025: Q3, the quarter-to-quarter producer price index for all items grew the same as last quarter by 0,9%. The quarter-to-quarter producer price index moderated for food products (3,5%), fish and fish products (6,4%), fruit and vegetables (2,9%), oils and fats (1,0%), starches and starch products, animal feeds (0,3%), “other food products” (2,5%) and bakery products (2,1%). However, meat and meat products (18,0%) and dairy products (0,9%) expanded, grain mill products (2,7%) contracted, while sugar (5,0%) decelerated in 2025: Q3.

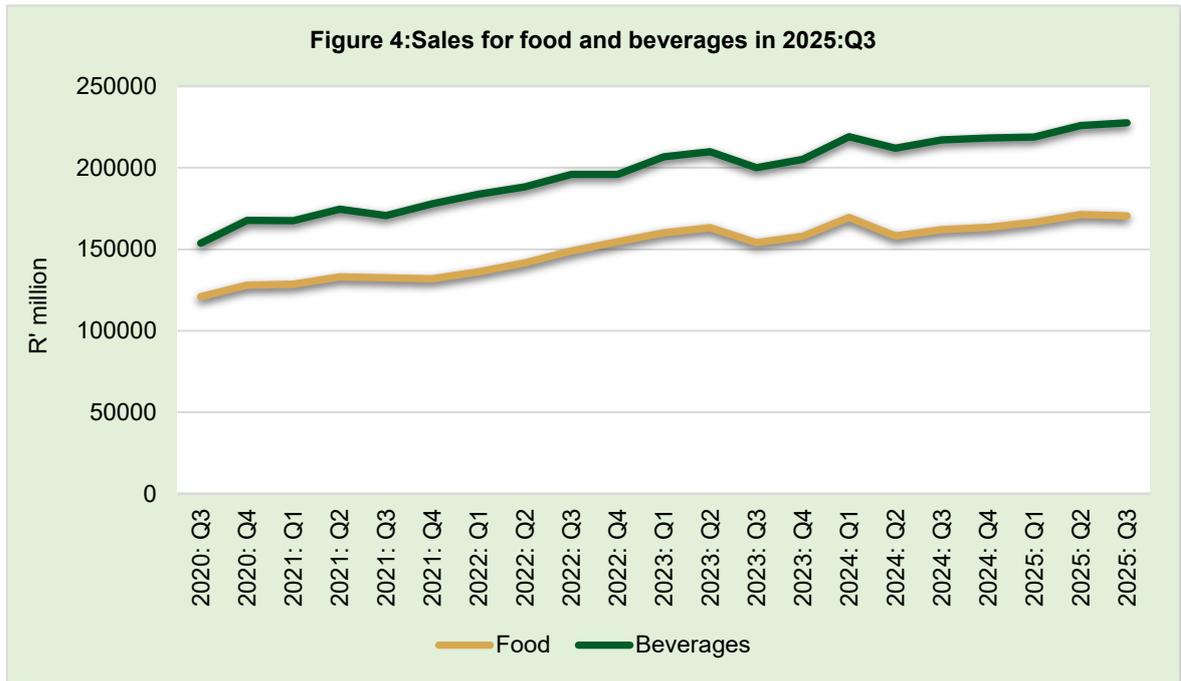
3. Volume of production



Source: Quantec, 2025

In 2025: Q3, the quarter-to-quarter seasonally adjusted volume of production for the food division receded further by 0,2% as compared to a 1,3% contraction in the preceding quarter. The seasonally adjusted volume of production for the beverages division, on the other hand, rose by 3,6% following a 0,7% growth in the last quarter (see Figure 3).

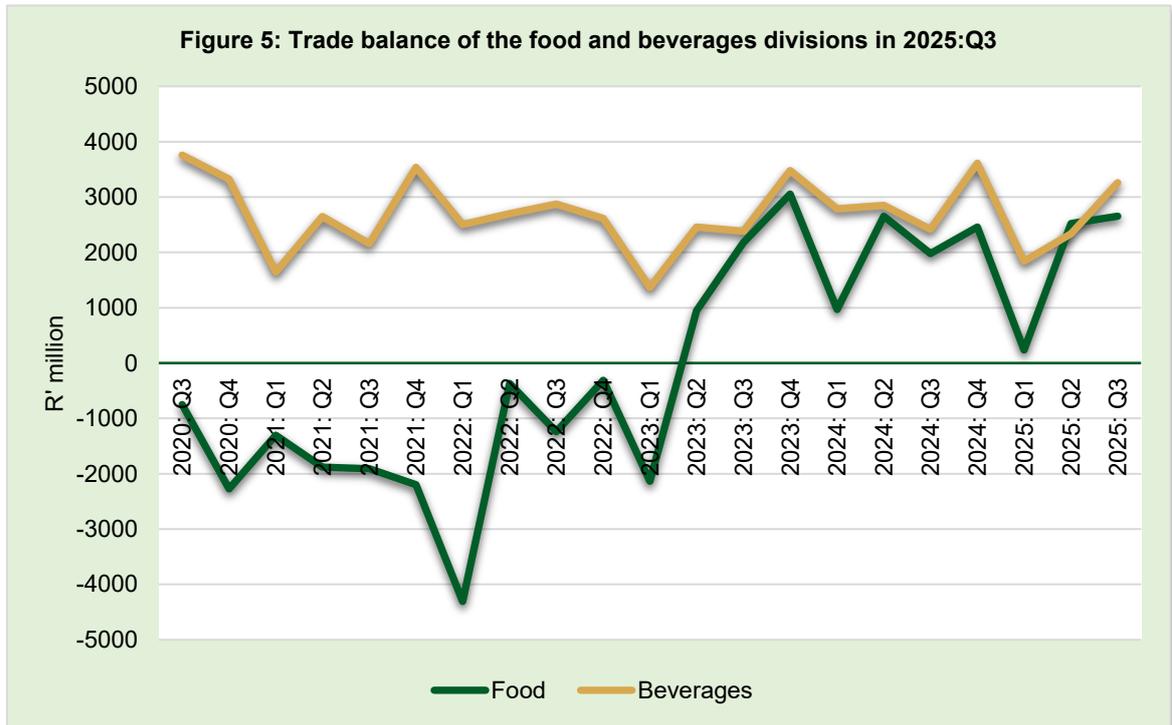
4. Sales



Source: Quantec, 2025

Figure 4 above shows the seasonally adjusted value of sales for the food and beverages divisions over the past five years. As depicted in Figure 4, the nominal value of sales for the food division decreased from R171 308,3 million in the previous quarter to R170 516,1 million in the current quarter, translating to a contraction of 0,5% in 2025: Q3. The nominal value of sales for the beverages division, however, rose by 4,6% quarter-to-quarter, representing an increase in nominal value to R54 608,6 million in 2025: Q3 from R57 129,1 million in 2025: Q2.

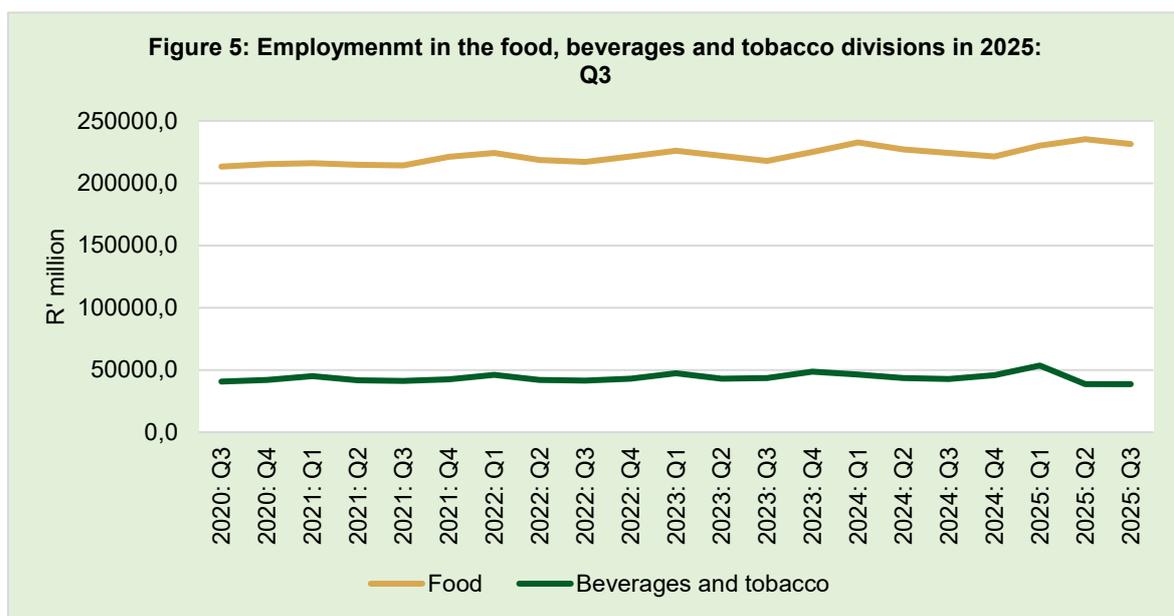
5. Trade



Source: Quantec, 2025

Figure 5 above shows the trade balance for the food and beverages divisions over the five-year period. The graph shows that the food and beverages divisions trade balance had been fluctuating since 2020: Q3 to 2025: Q3. The trade surplus for the food division narrowed from R3 651,2 million in the last quarter to R2 151,1 million in the current quarter under review. The trade surplus for the beverages division, however, widened from R2 873,9 million in 2025: Q2 to R3 081,1 million in 2025: Q3.

6. Employment



Source: Quantec, 2025

Figure 6 above shows employment in the food, beverages and tobacco divisions. In 2025: Q3, the quarter-to-quarter employment in the food division contracted by 1,7% from a 2,2% growth in the last quarter, however, the quarter-to-quarter beverages and tobacco division employment remained unchanged following a 28,0% contraction in the last quarter. Therefore, 3 951 and 5 jobs were shed in the food; and beverages and tobacco divisions, respectively, in 2025: Q3.

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