



agriculture

Department:  
Agriculture  
REPUBLIC OF SOUTH AFRICA

## Food and Beverages Quarterly Brief: No. 4, 2025

Directorate: Agro-processing Support

### Highlights of the fourth quarter of 2025 (2025: Q4) (October to December)

The consumer price index (CPI) for all items moderated by 0,4% following a 0,9% growth in 2025: Q3. However, the producer price index (PPI) for all items remained unchanged as compared to a growth of 0,9% in 2025: Q3.

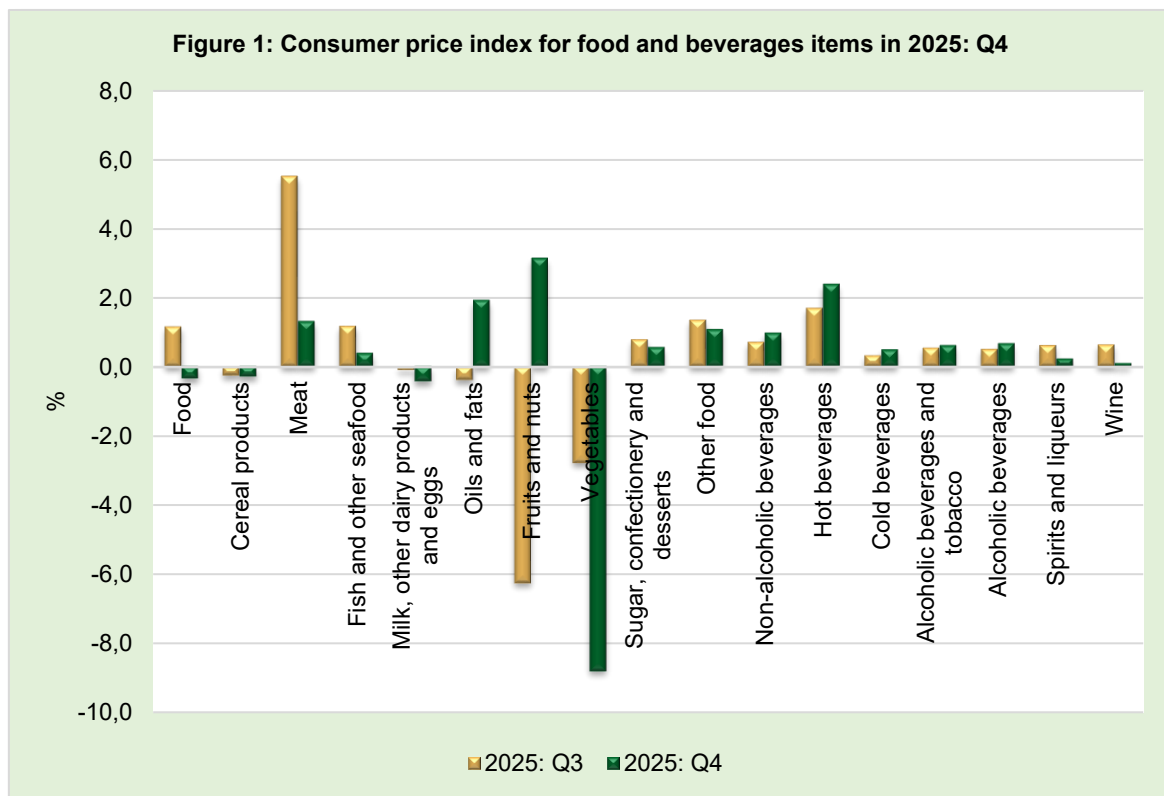
In 2025: Q4, the seasonally adjusted volume of production for the food division contracted quarter-to-quarter by 2,1% as compared to a 0,1% growth in 2025: Q3. The seasonally adjusted volume of production for the beverages division, however, moderated by 3,4% quarter-to-quarter in 2025: Q4, following a 4,1% growth in 2025: Q3.

The nominal value of sales for the food division decreased from R170 743,7 million in 2025: Q3 to R164 951,1 million in 2025: Q4, translating to a 3,4% deceleration quarter-to-quarter in 2025: Q4.

In 2025: Q4, the food division registered a trade deficit of R847,8 million from a trade surplus of R2 166,7 million in 2025: Q3. However, the trade surplus in the beverages division widened from R2 934,7 million in 2025: Q3 to R3 069,4 million in 2025: Q4.

In 2025: Q4, the quarter-to-quarter employment in the food division rebounded by 1,4%, however, the beverages and tobacco division employment remained unchanged as compared to a contraction of 0,4% in 2025: Q3.

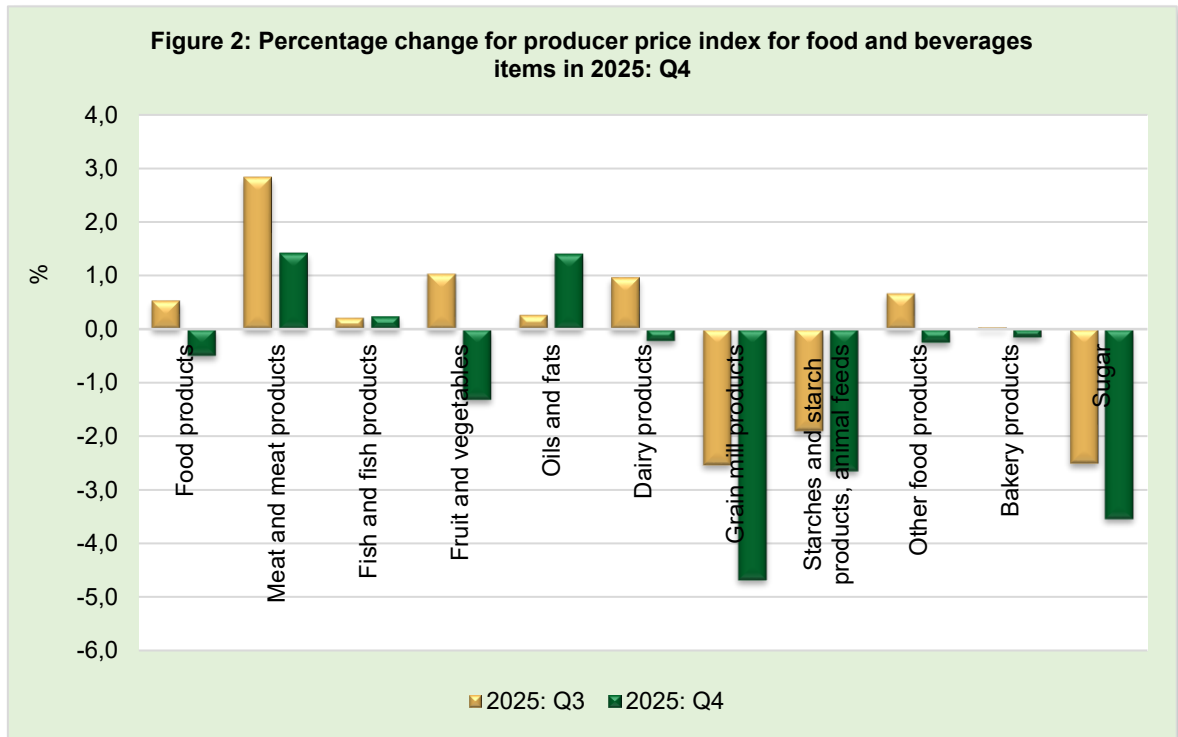
## 1. Consumer prices



Source: Statistics SA, 2026

Figure 1 above shows the consumer price index for food items in 2025: Q3 and 2025: Q4. In 2025: Q4, the consumer price index for all items moderated by 0,4% following a 0,9% growth in 2025: Q3. The items that moderated quarter-to-quarter during the period under review were meat (1,3%), fish and other sea food (0,4%), sugar, confectionery and desserts (0,6%), “other food products” (1,1%), spirits and liqueurs (0,2%) and wine (0,1%). Non-alcoholic beverages (1,0%), hot beverages (2,4%), cold beverages (0,5%), alcoholic beverages and tobacco (0,6%), alcoholic beverages (0,7%) and beer (1,2%) expanded. Food (0,4%) contracted, cereal products (0,3%) contracted further and milk, other dairy products and eggs (0,4%) and vegetables (8,8%) decelerated in 2025: Q4.

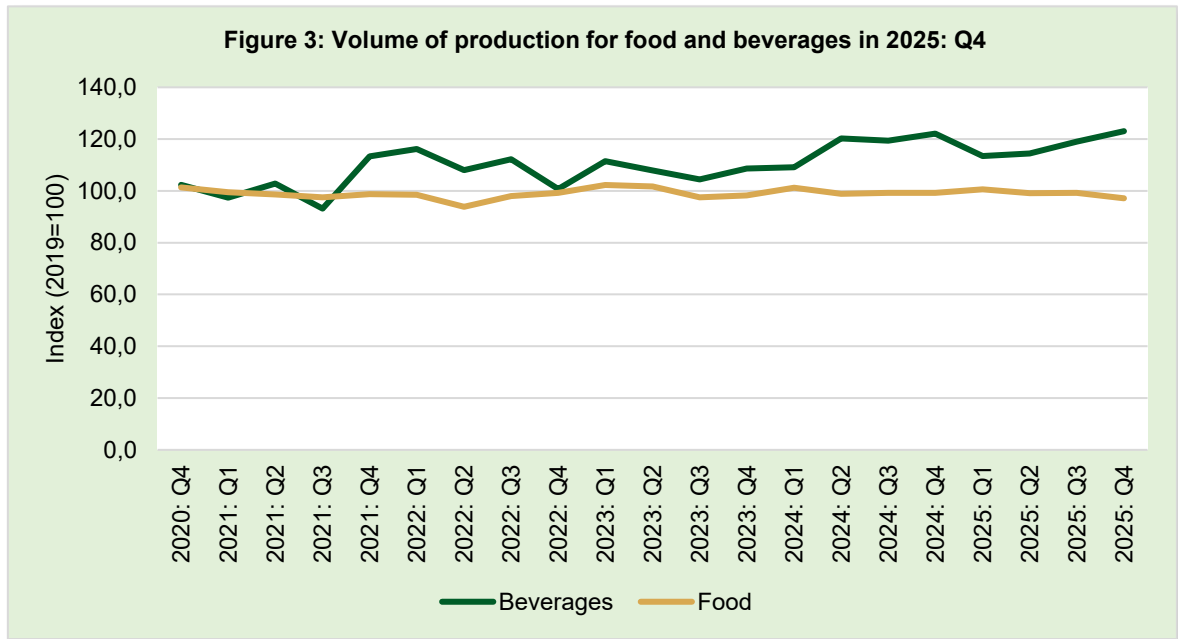
## 2. Producer prices



Source: Quantec, 2026

The PPI for food and beverages is depicted in Figure 2. In 2025: Q4, the producer price index for all items remained unchanged as compared to a growth of 0,9% in 2025: Q3. The quarter-to-quarter producer price index contracted for food products (0,5%), fruits and vegetables (1,3%), dairy products (0,2%), “other food products” (0,3%) and bakery products (0,2%). Meat and meat products (1,4%) moderated, fish and fish products (0,2%) and oils and fats (1,4%) both expanded, while grain mill products (4,7%), starches and starch products, animal feeds (2,7%) and sugar (3,5%) decelerated in 2025: Q4.

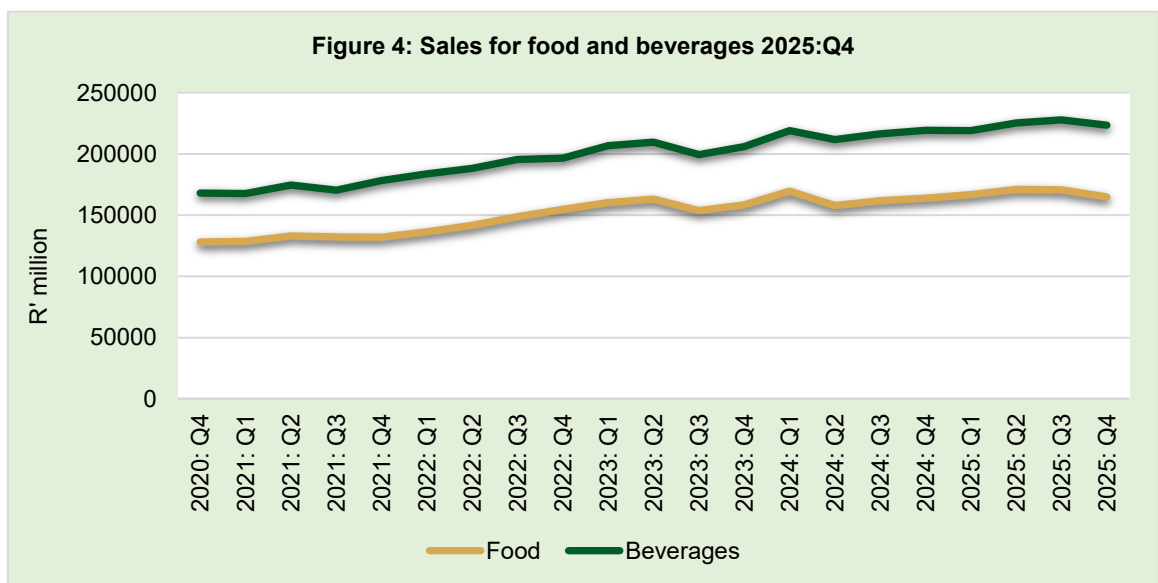
### 3. Volume of production



Source: Quantec, 2026

In 2025: Q4, the seasonally adjusted volume of production for the food division contracted quarter-to-quarter by 2,1% as compared to a 0,1% growth in 2025: Q3. The seasonally adjusted volume of production for the beverages division, however, moderated by 3,4% quarter-to-quarter in 2025: Q4, following a 4,1% growth in 2025: Q3 (see Figure 3).

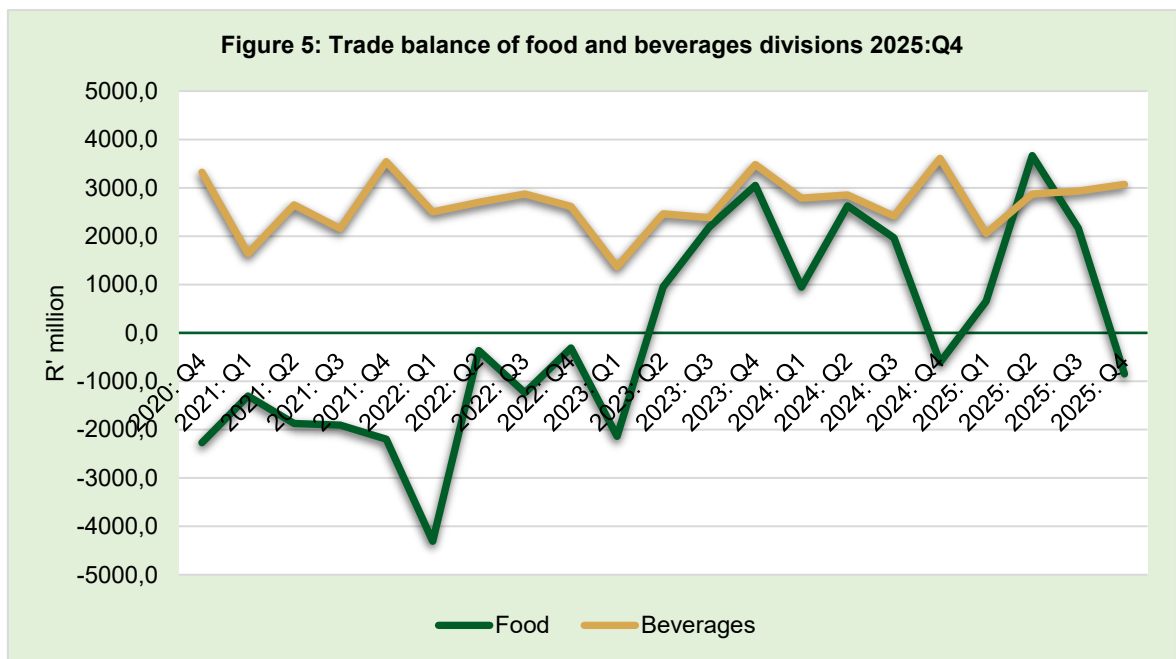
### 4. Sales



Source: Quantec, 2026

Figure 4 above shows the seasonally adjusted value of sales for the food and beverages divisions for the past five years. As depicted in Figure 4, the nominal value of sales for the food division decreased from R170 743,7 million in 2025: Q3 to R164 951,1 million in 2025: Q4, translating to a 3,4% contraction quarter-to-quarter in 2025: Q4. The nominal value of sales for the beverages division, however, moderated quarter-to-quarter by 2,5% in 2025: Q4, representing an increase in nominal value to R58 453,1 million in 2025: Q4 from R57 049,7 million in 2025: Q3.

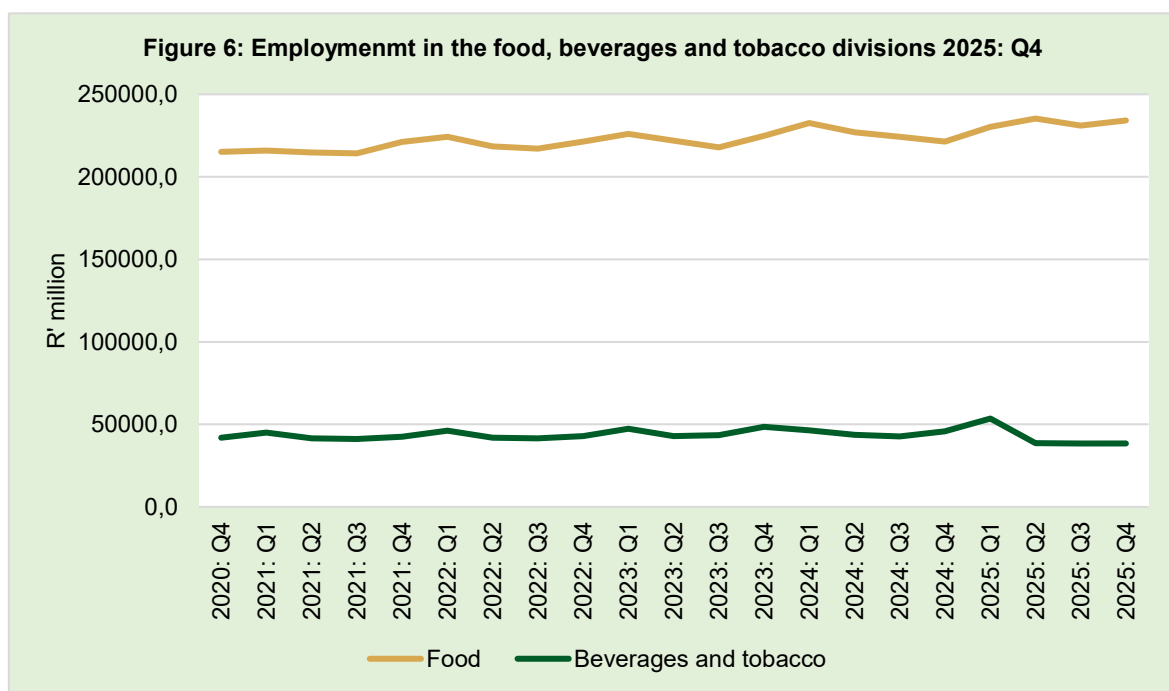
## 5. Trade



Source: Quantec, 2026

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: Q4 to 2025: Q4. In 2025: Q4, the food division recorded a trade deficit of R847,8 million from a trade surplus of R2 166,7 million in 2025: Q3. However, the trade surplus in the beverages division widened from R2 934,7 million in 2025: Q3 to R3 069,4 million in 2025: Q4.

## 6. Employment



Source: Quantec, 2025

Figure 6 above shows employment in the food, beverages and tobacco divisions. In 2025: Q4, the quarter-to-quarter employment in the food division rebounded by 1,4% from a 1,8% contraction in 2025: Q3. However, the beverages and tobacco division employment remained unchanged as compared to a contraction of 0,4% in 2025: Q3. Therefore, 3 145 and 8 jobs were created in the food; and beverages and tobacco divisions, respectively, in 2025: Q4.

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### All correspondence can be addressed to:

Directorate: Agro-processing Support

Private Bag X416, Pretoria, 0001, South Africa

Tel.: +27 12 319 8457/8311 • Fax: +27 12 319 8093 • Email: [JoshuaM@nda.gov.za](mailto:JoshuaM@nda.gov.za)

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