



agriculture

Department:
Agriculture
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Agro-processing Quarterly Brief: No. 1, 2025

Directorate: Agro-processing Support

Highlights of the first quarter of 2025 (2025: Q1) (January to March)

In 2025: Q1, the year-on-year producer price inflation for final manufactured goods expanded by 0,9% from an unchanged growth in 2024: Q4. Most divisions moderated during this period.

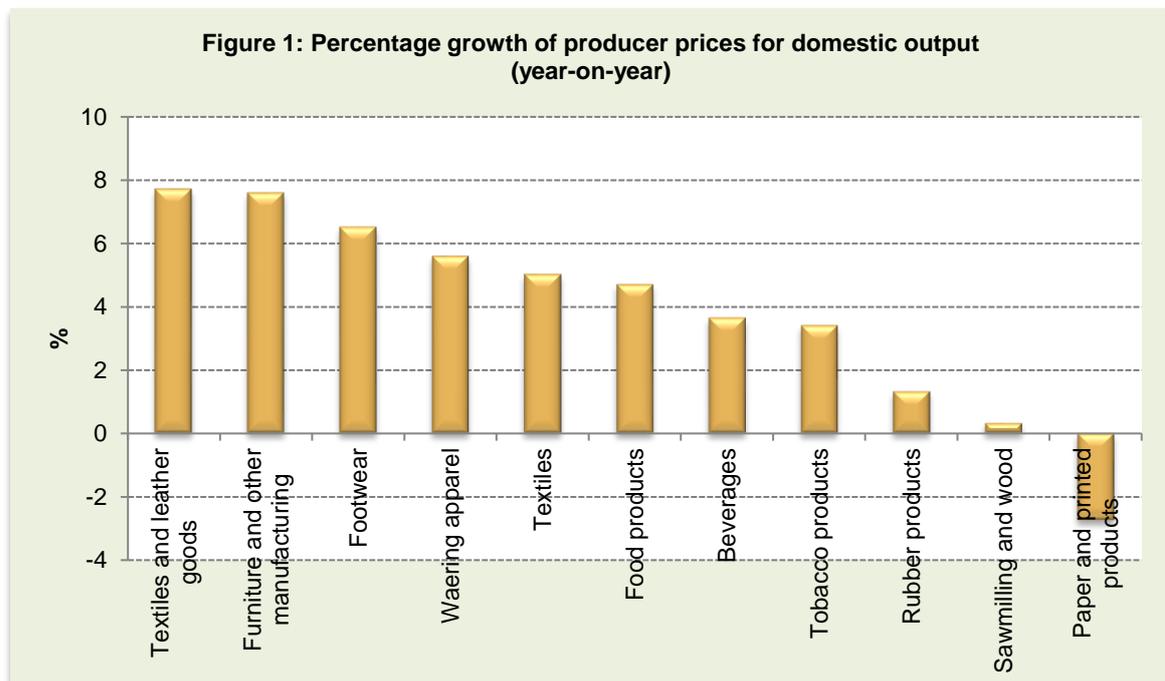
The agro-processing industry's seasonally adjusted volume of production rebounded by 0,2% in 2025: Q1 from a 1,2% growth in 2024: Q4.

The seasonally adjusted value of sales for the agro-processing industry rose by 0,6% in 2025: Q1 from a 0,1% growth in 2024: Q4. This represented an increase in nominal value of sales from R279 048,4 million in 2024: Q4 to R280 622,8 million in 2025: Q1.

In 2025: Q1, the trade deficit of the agro-processing industry widened from R13 521,2 million in 2024: Q4 to R14 575,5 million in 2025: Q1, which represents a rebound of 7,8% from a 13,8% growth in the last quarter.

In 2025: Q1, the agro-processing industry recorded about 473 898 jobs from 460 266 jobs in 2024: Q4, representing 13 632 jobs created in 2025: Q1.

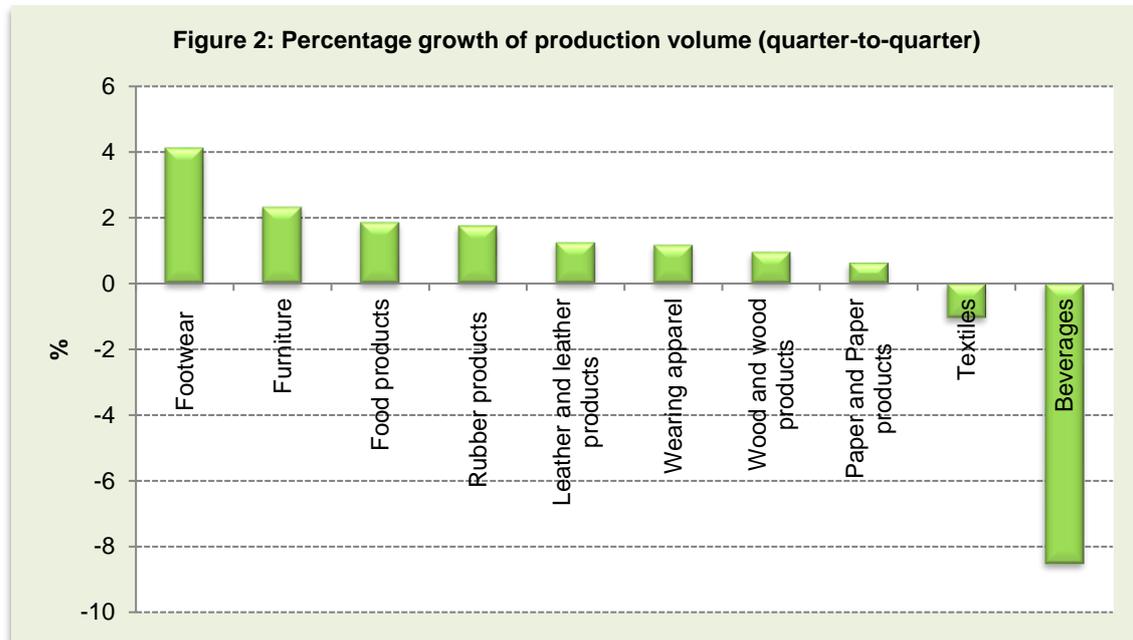
Producer prices



Source: Statistics SA, 2025

In 2025: Q1, the year-on-year producer price inflation for final manufactured goods expanded by 0,9% from an unchanged growth in 2024: Q4. Most divisions moderated during 2025: Q1, and those were: footwear (6,5%), textiles (5,0%), beverages (3,7%), rubber products (1,3%) and sawmilling and wood (0,3%). However, textiles and leather goods (7,7%), furniture and other manufacturing (7,6%), wearing apparel (5,6%), food products (4,7%) and tobacco products (3,4%) divisions expanded, while paper and printed products division decelerated by 2,7% in 2025: Q1 (see Figure 1).

Volume of production

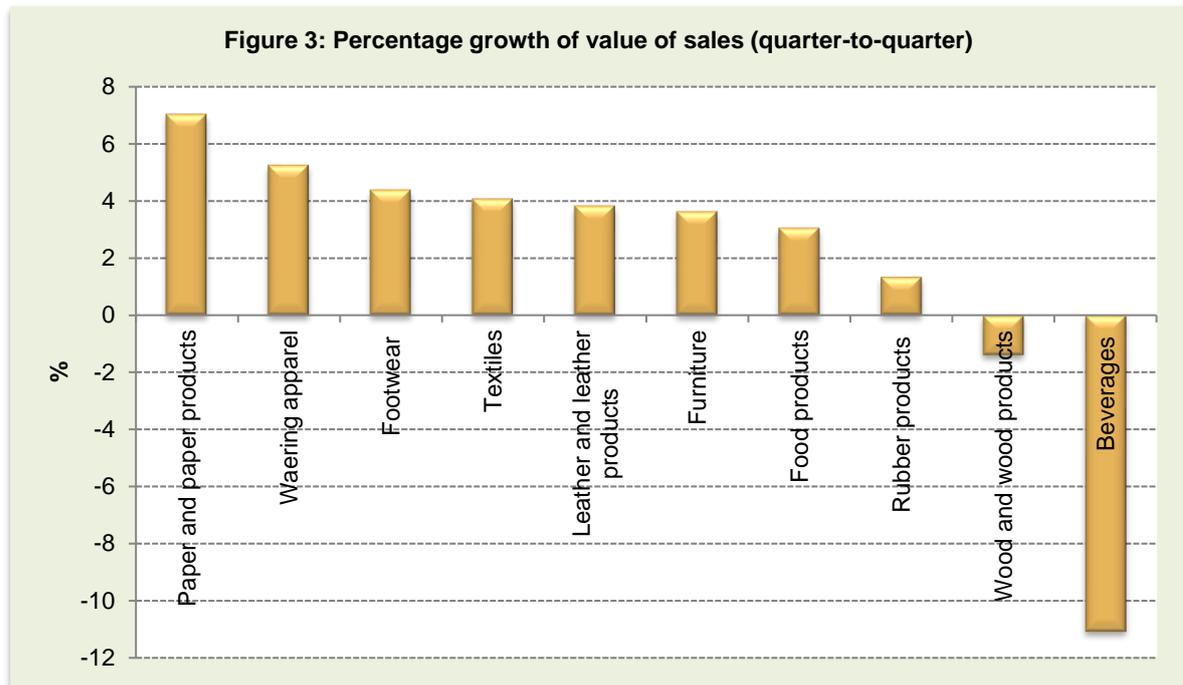


Source: Statistics SA, 2025

*Tobacco data not supplied

Figure 2 above shows the seasonally adjusted physical volume of production for the agro-processing divisions in 2025: Q1. The agro-processing industry's seasonally adjusted volume of production rebounded by 0,2% in 2025: Q1 from a 1,2% growth in 2024: Q4. Most divisions rebounded in 2025: Q1, and those were: food products (1,9%), footwear (4,1%), furniture (2,3%), leather and leather products (1,3%) and wearing apparel (1,2%). However, wood and wood products (1,0%) and paper and paper products (0,6%) divisions moderated, textiles (1,0%) division receded further, rubber products (1,8%) division expanded, while beverages division contracted by 8,5%

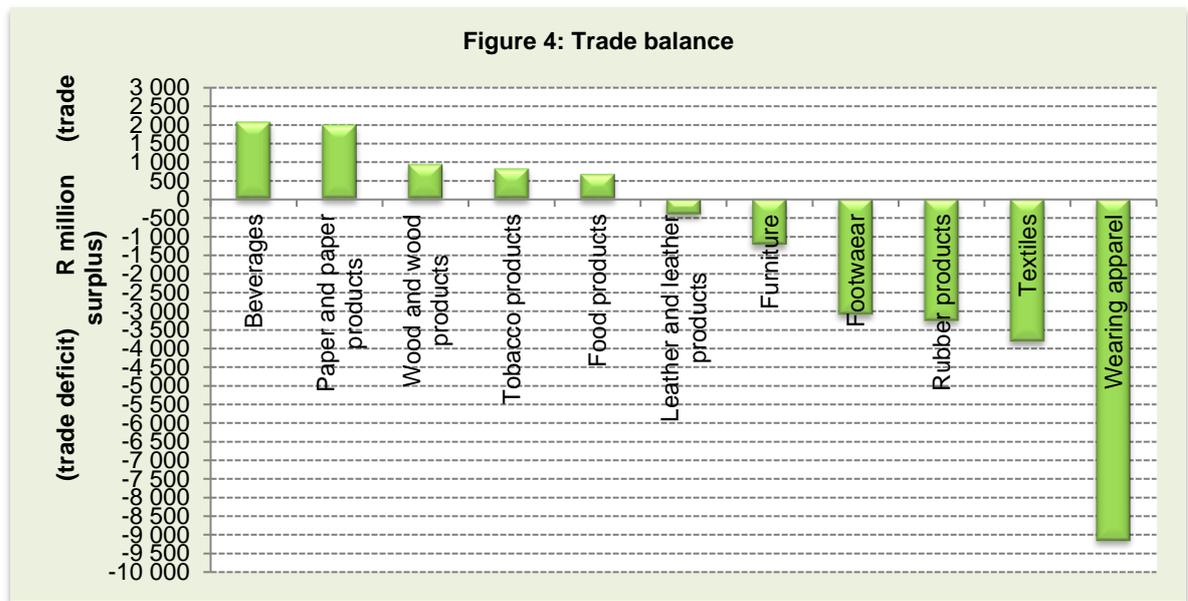
Value of sales



Source: Statistics SA, 2025

Figure 3 above shows the seasonally adjusted value of sales for the agro-processing divisions in 2025: Q1. The seasonally adjusted value of sales for the agro-processing industry rose by 0,6% in 2025: Q1 from a 0,1% growth in 2024: Q4. This represented an increase in nominal value of sales from R279 048,4 million in 2024: Q4 to R280 622,8 million in 2025: Q1. The seasonally adjusted value of sales rebounded for the following divisions: paper and paper products (7,0%), wearing apparel (5,2%), leather and leather products (3,8%) and furniture (3,6%). However, the textiles (4,1%), food products (3,1%) and rubber products (1,3%) divisions expanded, while the wood and wood products (1,4%) and beverages (11,4%) divisions contracted in in 2025: Q1.

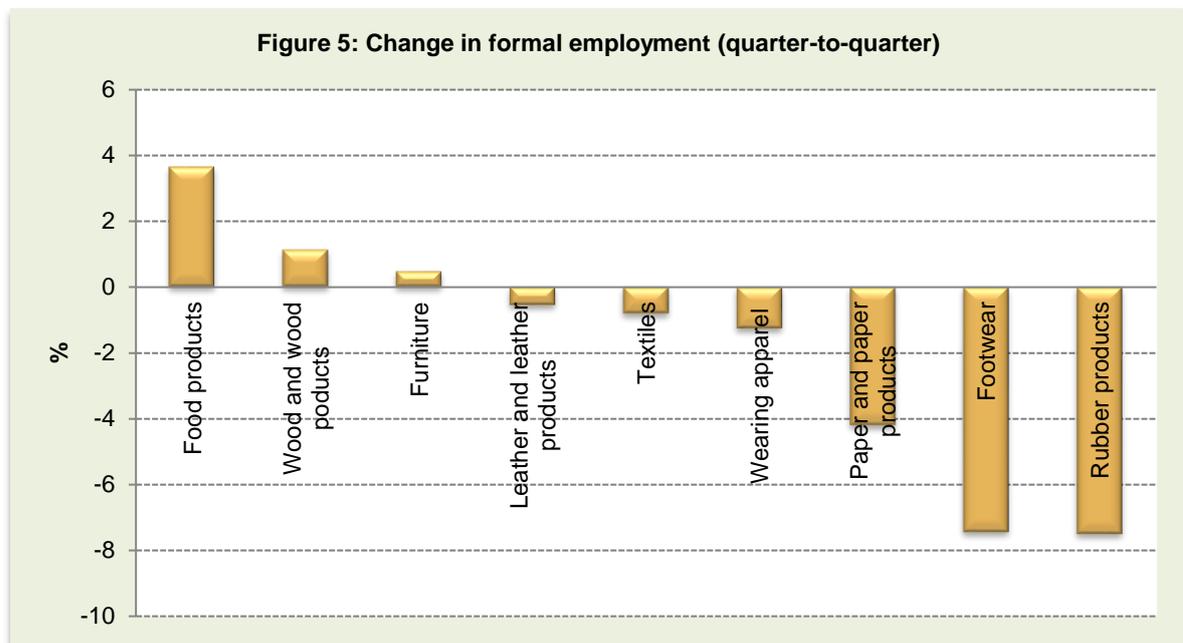
Trade



Source: Quantec, 2025

In 2025: Q1, the trade deficit of the agro-processing industry widened from R13 521,2 million in 2024: Q4 to R14 575,5 million in 2025: Q1, which represents a rebound of 7,8% from a 13,8% growth in the last quarter. The divisions that recorded a trade deficit during the period were: wearing apparel (R9 149,3 million), textiles (R3 823,7 million), rubber products (R3 268,5 million), footwear (R3 104,7 million), furniture (R1 237,2 million) and leather and leather products (R428,8 million). However, the following divisions registered a trade surplus: beverages (R2 061,3 million), paper and paper products (R1 977,8 million), wood and wood products (R925,7 million), tobacco products (R809,4 million) and food products (R662,3 million) (see Figure 4).

Formal employment



Source: Stats SA, 2025

In 2025: Q1, the agro-processing industry recorded about 473 898 jobs from 460 266 jobs in 2024: Q4, representing a 3,0% rebound in 2025: Q1. The following divisions decelerated during the period: paper and paper products (4,2%), textiles (0,8%) and rubber (7,5%). Leather and leather products (0,5%) and wearing apparel (1,3%) division receded further, beverages and tobacco (17,1%) division expanded, food (3,7%), furniture (0,5%) and wood and wood products (1,1%) divisions rebounded, while footwear division contracted by 7,4% (see Figure 5).

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