

Agro-processing Quarterly Brief: No. 4, 2025

Directorate: Agro-processing Support

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

In 2025: Q4, the year-on-year producer price inflation for final manufactured goods, the producer price index for all items, remained unchanged as compared to a 0,9% growth in the last quarter.

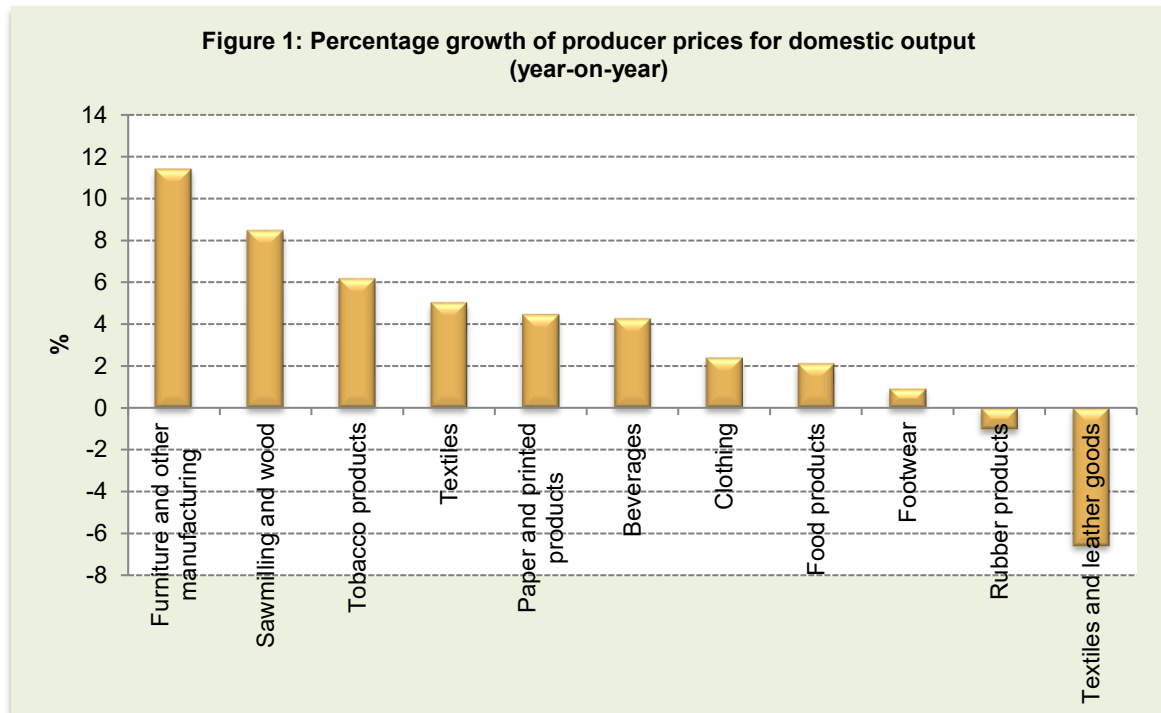
The agro-processing industry's seasonally adjusted volume of production rebounded by 0,3% in 2025: Q4 from a 0,1% contraction in 2025: Q3.

The seasonally adjusted value of sales for the agro-processing industry contracted by 1,9% in 2025: Q4 from a 0,7% growth in 2025: Q3. This represented an increase in nominal value of sales from R300 184,3 million in 2025: Q3 to R294 434,2 million in 2025: Q4.

The trade deficit of the agro-processing industry narrowed from R14 051,9 million in 2025: Q4 to R13 400,4 million in 2024: Q4, which represents a contraction of 4,6% from a 114,1% growth in the last quarter.

In 2025: Q4, the agro-processing sector recorded about 458 829 jobs from 458 933 jobs in 2025: Q3, representing 104 jobs shed in 2025: Q4.

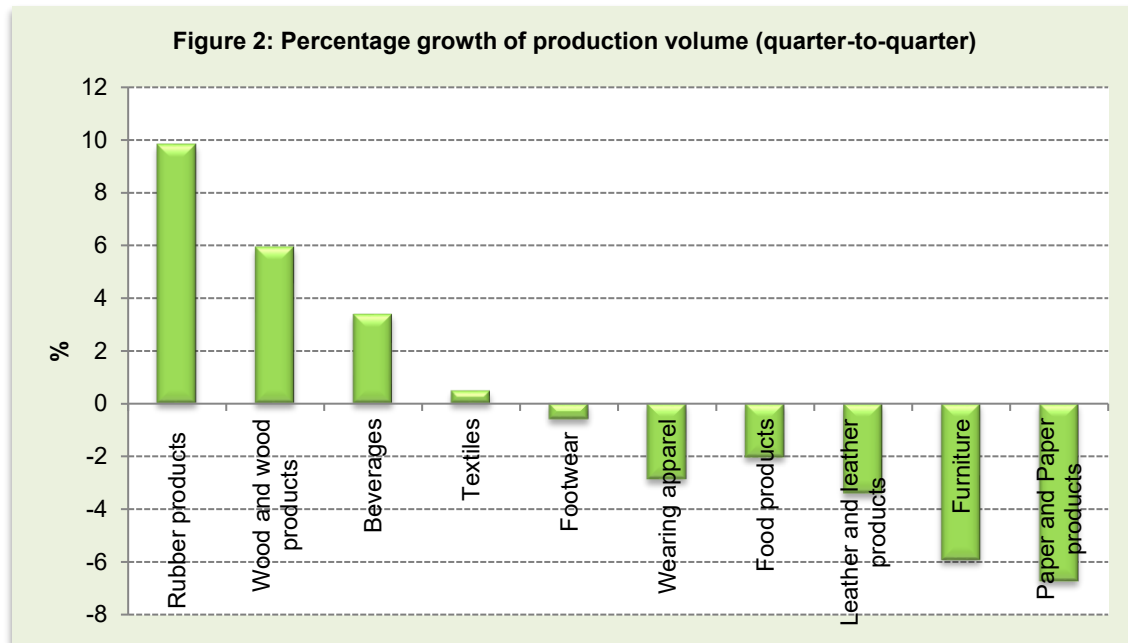
Producer prices



Source: Statistics SA, 2026

In 2025: Q4, the year-on-year producer price inflation for final manufactured goods rose by 2,9% as compared to 1,9% growth in the last quarter. In 2025: Q4, the following divisions grew the same as compared to the last quarter: tobacco products (6,2%), textiles (5,0%) and beverages (4,3%); furniture and other manufacturing (11,4%) and sawmilling and wood (8,5%) expanded; paper and printed products (4,5%) rebounded; wearing apparel (2,4%), food products (2,1%) and footwear (0,9%) moderated and rubber products (1,0%) contracted while textiles and leather goods (6,6%) divisions decelerated (see Figure 1).

Volume of production

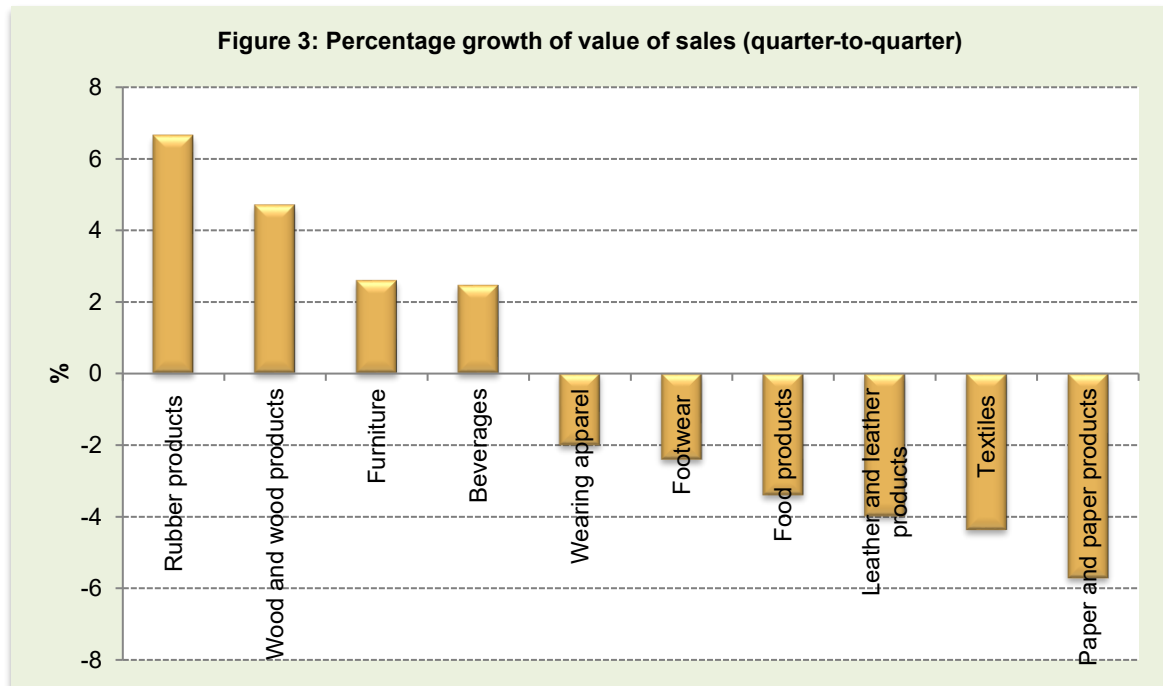


Source: Statistics SA, 2026

*Tobacco data not supplied

Figure 2 above shows the seasonally adjusted physical volume of production for the agro-processing divisions in 2025: Q4. The agro-processing industry's seasonally adjusted volume of production rebounded by 0,3% in 2025: Q4 from a 0,1% contraction in 2025: Q3. The beverages (3,4%) and textiles (0,5%) divisions moderated, wearing apparel (2,9%), furniture (5,9%) and food products (2,1%) contracted, rubber (9,8%) and wood and wood products (5,8%) divisions rebounded, paper and paper products division (6,7%) receded further and footwear (0,6%) and leather and leather products (3,4%) divisions decelerated in 2025: Q4.

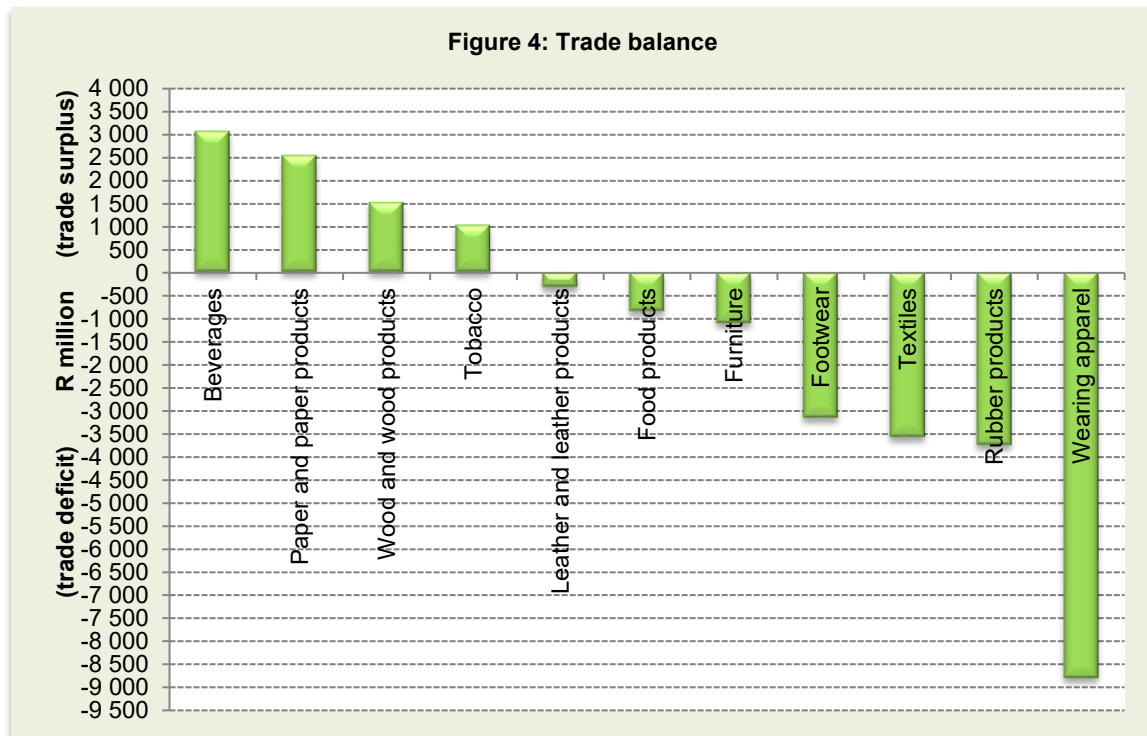
Value of sales



Source: Statistics SA, 2026

Figure 3 above shows the seasonally adjusted value of sales for the agro-processing divisions in 2025: Q4. The seasonally adjusted value of sales for the agro-processing industry contracted by 1,9% in 2025: Q4 from a 0,7% growth in 2025: Q3. This represented an increase in nominal value of sales from R300 184,3 million in 2025: Q3 to R294 434,2 million in 2025: Q4. The seasonally adjusted value of sales expanded for the wood and wood products (4,7%) and furniture (2,6%) divisions; the footwear (2,4%), paper and paper products (5,7%) and food products (3,4%) divisions decelerated; the beverages (2,5%) division moderated; the leather and leather products (4,0%) division receded further and the rubber products (6,6%) division rebounded while the textiles (4,4%) and wearing apparel (2,0%) divisions contracted in 2025: Q3.

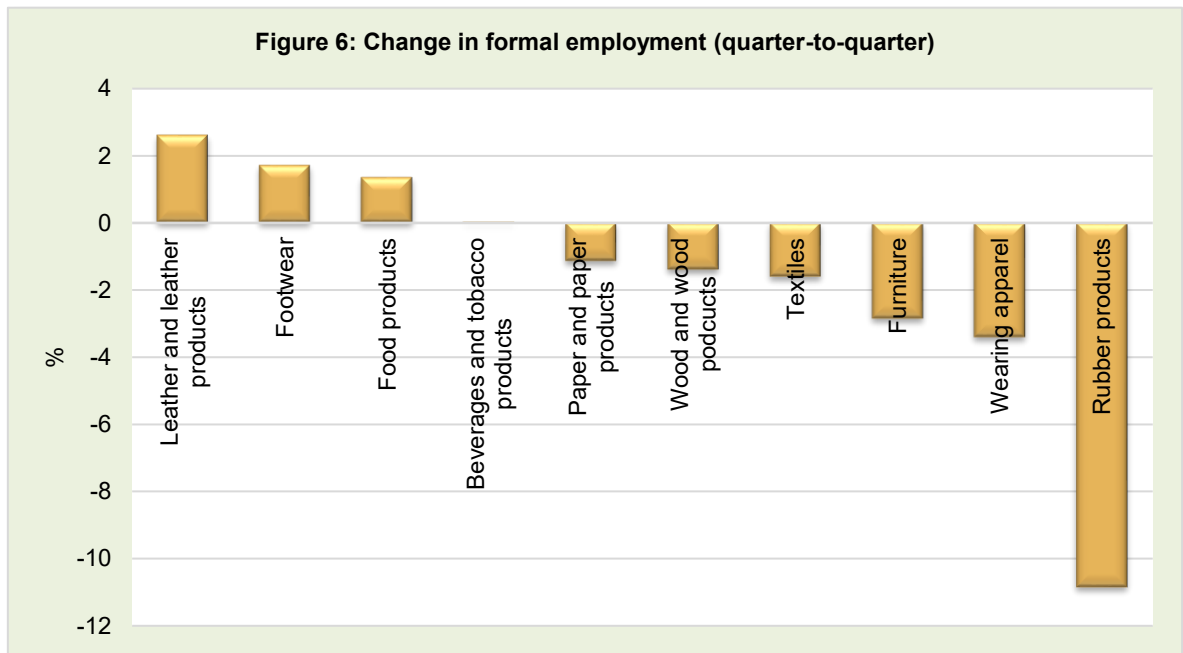
Trade



Source: Quantec, 2026

In 2025: Q4, the trade deficit of the agro-processing industry narrowed from R14 051,9 million to R13 400,4 million in 2025: Q3, which represents a contraction of 4,6% from a 114,1% growth in the last quarter. The divisions that recorded a trade deficit during the period were: wearing apparel (R8 806,7 million), rubber products (R3 751,4 million), textiles (R3 577,7 million), footwear (R3 158,6 million), furniture (R1 106,9 million), food products (R847,8 million) and leather and leather products (R326,2 million). However, the following divisions registered a trade surplus during the period under review: beverages (R3 069,4 million), paper and paper products (R2 549,2 million), wood and wood products (R1 524,6 million) and tobacco (R1 031,8 million) (see Figure 4).

Formal employment



Source: Stats SA, 2026

In 2025: Q4, the agro-processing industry recorded about 458 829 jobs from 458 933 jobs in 2025: Q3, representing 104 jobs shed in 2025: Q4. This can be attributed to job losses in the following divisions: wearing apparel (1 154), furniture (877), wood and wood products (591), textiles (472), paper and paper products (369) and rubber (8); however, food products (3 154), leather and leather products (122), footwear (92) and beverages and tobacco (8) divisions created jobs in 2025: Q4 (see Figure 6).

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 • E-mail: JoshuaM@nda.gov.za

This publication is also available on the internet at:

<http://www.nda.gov.za>

This document has been compiled by the Department of Agriculture, every effort has been made to ensure the accuracy and thoroughness of the information contained herein and the department cannot be held responsible for any errors, omissions or inaccuracies in such information and data, whether inadvertent or otherwise. The Department of Agriculture, therefore, accepts no liability that can be incurred resulting from the use of this information.