# MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA APRIL 2026

**Issued: 8 May 2026**

**Directorate: Statistics and Economic Analysis**

- **According to the latest Seasonal Climate Watch from the South African Weather Service for the period May to September 2026, the El Niño-Southern Oscillation (ENSO) is currently still in a neutral state.**
- **The projected closing stocks of wheat for the 2025/26 marketing year are 494 914 tons, which includes imports of 1,840 million tons. It is also 24,0% less than the previous years' ending stocks.**
- **The expected commercial maize crop for 2026 is 16,835 million tons, which is 1,1% more than the 16,650 million tons of the previous season (2025).**
- **Projected closing stocks of maize for the 2025/26 marketing year are 2,810 million tons, which is 329,8% more than the previous years' ending stocks.**
- **Projected closing stocks of maize for the current 2026/27 marketing year are 3,830 million tons, which is 36,3% more than the previous years' ending stocks**
- **The projected closing stocks of sorghum for the current 2026/27 marketing year are 80 914 tons, which is 10,3% less than the previous year's ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2026/27 marketing year are 85 896 tons, which is 74,4% more than the previous year's ending stocks.**
- **The projected closing stocks of soybeans for the current 2026/27 marketing year are 443 035 tons, which is 54,8% more than the previous year's ending stocks.**
- **The annual percentage change in the CPI was higher at 3,1% in March 2026.**
- **The annual percentage change in the PPI for final manufactured goods was higher at 2,3% in March 2026.**
- **March 2026 tractor sales of 618 units were almost 8% less than the 671 units sold in March 2025.**

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# 1. Weather conditions

## 1.1 Seasonal climate watch

According to the latest Seasonal Climate Watch from the South African Weather Service for the period May to September 2026, the El Niño-Southern Oscillation (ENSO) is currently still in a neutral state; current predictions indicate that it will rapidly move towards an El Niño state within the next few months and continue to strengthen up to spring and the start of the next summer season.

However, caution is advised as the prediction skill of the ENSO phenomena can be limited during the winter months and therefore it is highly recommended to keep track of the forecasts during and after winter.

During the winter seasons, it is only the south-western, southern and eastern coastal areas that receive significant rainfall. The eastern coastal areas are expected to receive above-normal rainfall during the winter seasons and below-normal rainfall is expected for the south-western and southern coastal areas during this period.

Minimum and maximum temperatures are largely expected to be above-normal for most parts of South Africa during the winter seasons.

## 1.2 Level of dams

Available information on the level of South Africa's dams on 4 May 2026 indicates that the country has approximately 96% of its full supply capacity (FSC) available, which is 3,0% less as compared to the corresponding period in 2025. The Limpopo (12%), Free State (4%), North West (2%) and Mpumalanga (1%) provinces, all show increases in the full supply capacity as compared to 2025. However, the Western Cape (-11%), Eastern Cape (-7%), KwaZulu-Natal (-6%) and Northern Cape (3%) provinces, show decreases in the full supply capacity as compared to 2025. The Gauteng Province shows no change in the full supply capacity for the same period.

The provincial distribution of South Africa's water supply including Lesotho and Eswatini is contained in **Table 1** below.

**Table 1: Level of dams, 4 May 2026**

| Province | Net FSC million cubic meters | 4/05/2026 (%) | Last Year (2025) (%) | % Increase/Decrease 2026 vs. 2025 |
|---|---|---|---|---|
| **Eastern Cape** | 1 726 | 78 | 85 | -7,0 |
| **Free State** | 15 665 | 103 | 107 | 4,0 |
| **Gauteng** | 128 | 102 | 102 | - |
| **Kindom of Lesotho** | 2 363 | 101 | 100 | 1,0 |
| **Kingdom of Eswatini** | 334 | 100 | 100 | - |
| **Kwazulu-Natal** | 4 910 | 91 | 97 | -6,0 |
| **Limpopo** | 1 485 | 102 | 90 | 12,0 |
| **Mpumalanga** | 2 538 | 101 | 100 | 1,0 |
| **North West** | 866 | 103 | 101 | 2,0 |
| **Northern Cape** | 149 | 123 | 126 | -3,0 |
| **Western Cape** | 1 866 | 46 | 57 | -11,0 |
| **Total** | 32 030 | **96** | **99** | -3,0 |

*Source: Department of Water and Sanitation*

# 2. Grain production

## 2.1 Summer grain crops - 2026

The revised area planted and third production forecast for summer grains for the 2026 season was released by the Crop Estimates Committee (CEC) on 23 April 2026, and is as follows:

**Table 2: Commercial summer grains: Revised area planted and third production forecast - 2026 season**

| **CROP** | **Area planted 2026 Ha (A)** | **3rd forecast 2026 Tons (B)** | Area planted 2025 Ha (C) | Final estimate 2025 Tons (D) | Change 2026 vs 2025 % (B) ÷ (d) |
|---|---|---|---|---|---|
| **Commercial:** | | | | | |
| White maize | **1 664 700** | **9 084 650** | 1 599 700 | 8 450 000 | 7,51% |
| Yellow maize | **1 051 500** | **7 750 450** | 997 000 | 8 200 000 | -5,48% |
| Total Maize | **2 716 200** | **16 835 100** | 2 596 700 | 16 650 000 | 1,11% |
| Sunflower seed | **570 100** | **821 630** | 555 700 | 700 000 | 17,38% |
| Soybeans | **1 212 700** | **2 808 925** | 1 151 000 | 2 800 000 | 0,32% |
| Groundnuts | **44 650** | **69 360** | 48 125 | 63 350 | 9,49% |
| Sorghum | **45 000** | **140 653** | 41 150 | 150 000 | -6,23% |
| Dry beans | **38 920** | **79 450** | 45 620 | 90 556 | -12,26% |
| TOTAL | **4 627 570** | **20 755 118** | 4 438 295 | 20 453 906 | 1,47% |

Note: Estimate is for calendar year, e.g. production season 2025/26 = 2026

- The area estimate for **maize** is 2 716 200 ha, which is 4,60% or 119 500 ha more than the 2 596 700 ha planted for the previous season. The production forecast of maize is 16 835 100 tons, which is 1,11% or 185 100 tons more than the 8 450 000 tons of last season. The yield for maize is 6,20 t/ha.
- The area estimate for **white maize** is 1 664 700 ha, which represents an increase of 4,06% or 65 000 ha compared to the 1 599 700 ha planted last season. The production forecast of white maize is 9 084 650 tons, which is 7,51% or 634 650 tons more than the 8 450 000 tons of last season. The yield for white maize is 5,46 t/ha.
- In the case of **yellow maize,** the area estimate is 1 051 500 ha, which is 5,47% or 54 500 ha more than the 997 000 ha planted last season. The yellow maize production forecast is 7 750 450 tons, which is 5,48% or 449 550 tons less than the 8 200 000 tons of last season. The yield for yellow maize is 7,37 t/ha.
- The area estimate for **sunflower seed** is 570 100 ha, which is 2,59% or 14 400 ha more than the 555 700 ha planted the previous season. The production forecast for sunflower seed is 821 630 tons, which is 17,38% or 121 630 tons more than the 700 000 tons of the previous season. The expected yield is 1,44 t/ha.
- It is estimated that 1 212 700 ha have been planted to **soybeans**, which represents an increase of 5,36% or 61 700 ha compared to the 1 151 000 ha planted last season. The production forecast is 2 808 925 tons, which is 0,32% or 8 925 tons more than the 2 800 000 tons of the previous season. The expected yield is 2,32 t/ha.
- For **groundnuts**, the area estimate is 44 650 ha, which is 7,22% or 3 475 ha less than the 48 125 ha planted for the previous season. The expected crop is 69 360 tons – which is 9,49% or 6 010 tons more than the 63 350 tons of last season. The expected yield is 1,55 t/ha.
- The area estimate for **sorghum** is 45 000 ha, an increase of 9,36% or 3 850 ha against the 41 150ha of the previous season. The production forecast for sorghum is 140 653 tons, which is 6,23% or 9 348 tons less than the 150 000 tons of the previous season. The expected yield is 3,13 t/ha.
- For **dry beans**, the area estimate is 38 920 ha, which is 14,69% or 6 700 ha less than the 45 620 ha planted for the previous season. The production forecast is 79 450 tons, which is 12,26% or 11 106 tons less than the 90 556 tons of the previous season. The expected yield is 2,04 t/ha.

*The area planted and fourth production forecast will be released by the Crop Estimates Committee on 26 May 2026.*

### 2.2 Winter cereal crops – 2025

The CEC also released intentions to plant winter cereals for 2026 on 23 April 2026 and is as follows:

**Table 3: Winter cereals: Intentions to plant - 2026 season**

| CROP | **Intentions* 2026**<br>**Ha**<br>**(A)** | Area planted 2025<br>Ha<br>(B) | Final estimate 2025<br>Tons<br>(C) | Change<br>%<br>(A) ÷ (B) |
|---|---|---|---|---|
| **Commercial:** | | | | |
| Wheat | **486 400** | 517 300 | 1 905 500 | -5,97% |
| Barley | **101 900** | 96 950 | 345 000 | 5,11% |
| Canola | **189 175** | 174 515 | 306 000 | 8,40% |
| Oats | **39 000** | 35 520 | 43 500 | 9,80% |
| Sweet lupines | **21 000** | 21 000 | 17 850 | 0,00% |
| Total winter | **837 475** | 845 285 | 2 617 850 | -0,92% |

* Based on conditions at the middle of April 2026

- Early indications are that producers intend to plant 486 400 ha of **wheat** for the 2026 production season. This is 5,97% or 30 900 ha less than the 517 300 ha planted to wheat in 2025.
- The main producing areas are within the Western Cape with 335 000 ha (69%), followed by the Free State with 55 000 ha (11%) and the Northern Cape with 41 000 ha (8%).
- The expected area planted to **malting barley** is 101 900 ha, which is 5,11% or 4 950 ha more than the 96 950 ha of the previous year.
- The expected area planted to **canola** is 189 175 ha, which is 8,40% or 14 660 ha more than the 174 515 ha planted in 2025.
- Producers intend to plant 39 000 ha of **cereal oats**, which is 9,80% or 3 480 ha more than the 35 520 ha of the previous season.
- The expected area planted to **sweet lupines** is 21 000 ha – the same as the previous season.

Please note that the preliminary area estimate of winter crops for 2026 will be released on 28 July 2026.

### 2.3 Non-commercial maize - 2026

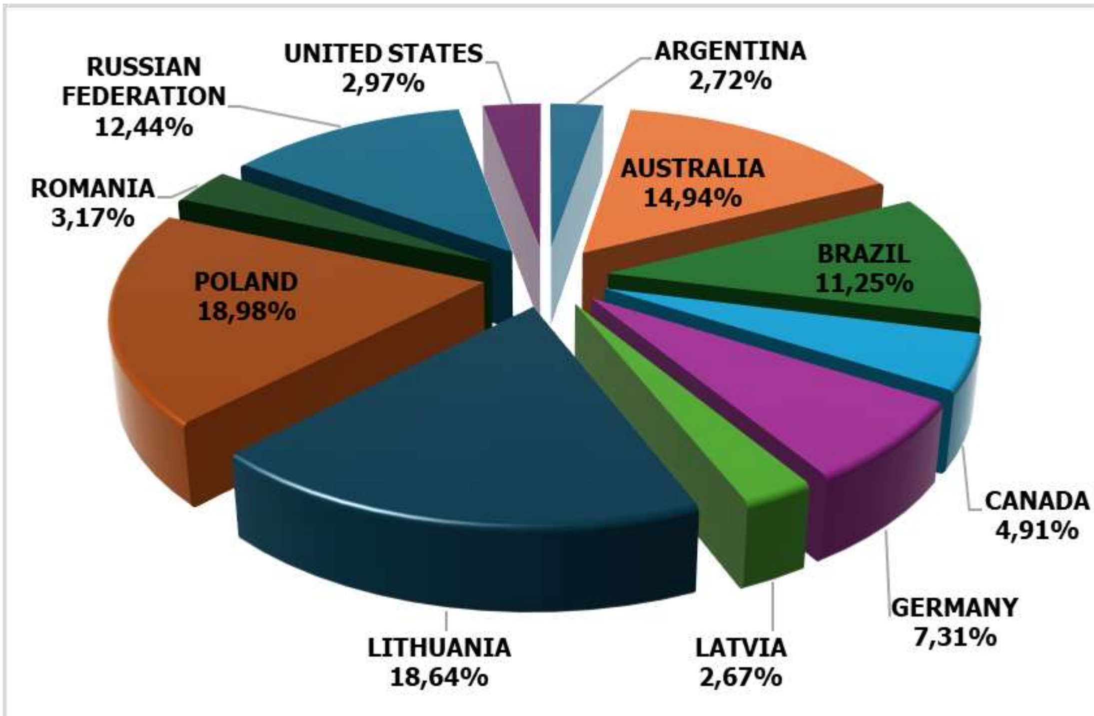
Please note that the preliminary area planted and production estimate of the non-commercial maize sector for the 2026 season will be published on 26 May 2026.

## 3. Cereal balance sheets

For the latest Cereal Balance Sheets (supply and demand tables) on maize, wheat, sorghum, sunflower seed and soybeans please refer to the attachment called FSB APR26 Annexure A.

### 3.1 Imports and exports of wheat for the 2025/26 marketing year

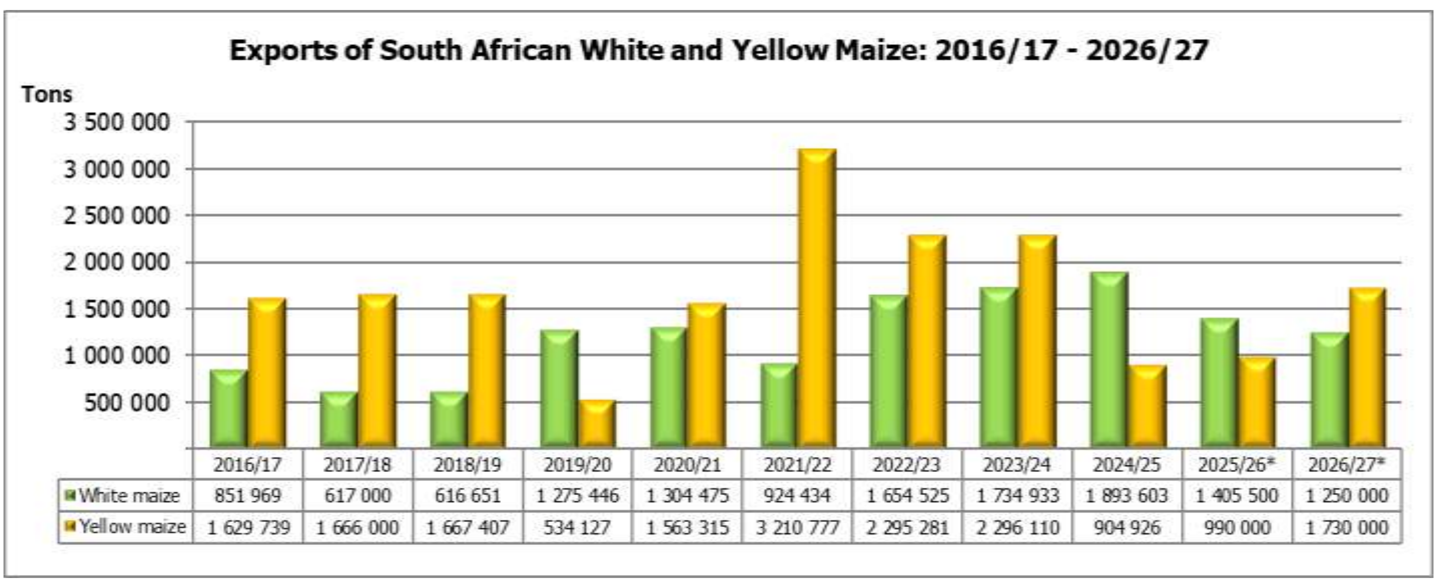
**Graph 1: Major countries of wheat imports to South Africa: 2025/26 marketing year**




- The progressive wheat imports (human consumption) for the 2025/26 marketing year (27 September 2025 to 1 May 2026) amount to 1 117 703 tons, with 18,98% or 212 121 tons from Poland, followed by 18,64% or 208 297 tons from Lithuania, 14,94% or 167 009 tons from Australia, 12,44% or 139 050 tons from Russian Federation, 11,25% or 125 707 tons from Brazil, 7,31% or 81 702 tons from Germany, 4,91% or 54 882 tons from Canada, 3,17% or 35 432 tons from Romania, 2,97% or 33 244 tons from the United States, 2,72% or 30 376 tons from Argentina and only 2,67% or 29 883 tons from Latvia. The exports of wheat (human consumption) for the above-mentioned period amount to 42 152 tons, of which 34,44% or 14 517 tons went to Zambia, 25,01% or 10 542 tons went to Botswana, 22,86% or 9 638 tons went to Lesotho, 15,17% or 6 396 tons went to Zimbabwe and only 2,51% or 1 059 tons went to Namibia.

### 3.2 Exports of South African white and yellow maize

**Graph 2: Exports of South African white and yellow maize: 2016/17 - 2026/27 marketing year**



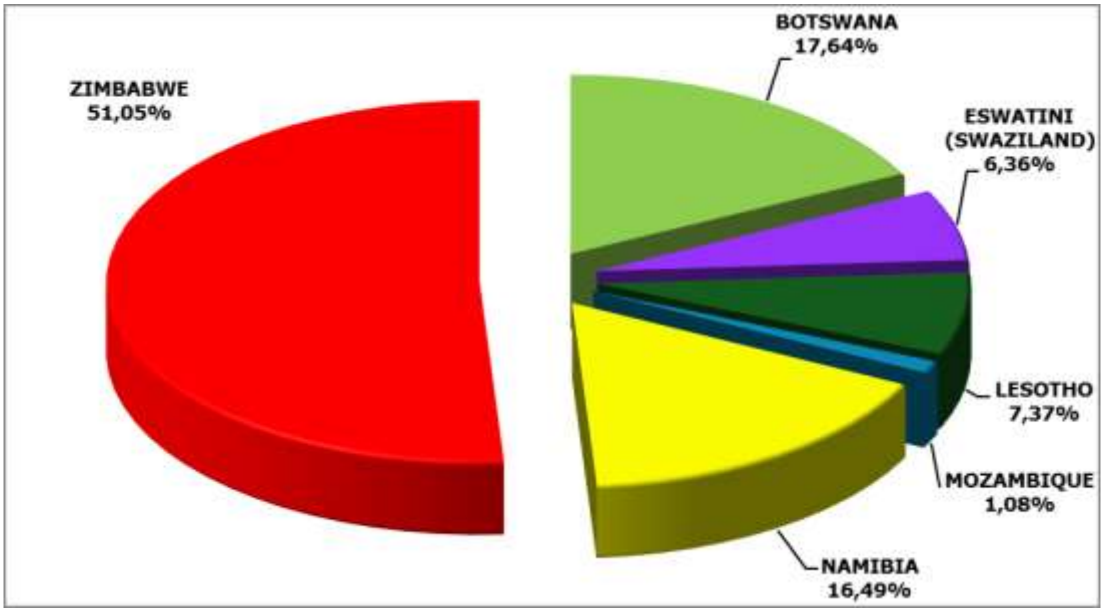

| | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 2023/24 | 2024/25 | 2025/26* | 2026/27* |
|---|---|---|---|---|---|---|---|---|---|---|---|
| White maize | 851 969 | 617 000 | 616 651 | 1 275 446 | 1 304 475 | 924 434 | 1 654 525 | 1 734 933 | 1 893 603 | 1 405 500 | 1 250 000 |
| Yellow maize | 1 629 739 | 1 666 000 | 1 667 407 | 534 127 | 1 563 315 | 3 210 777 | 2 295 281 | 2 296 110 | 904 926 | 990 000 | 1 730 000 |

*Projection

- The exports of white maize for the 2025/26 marketing year are projected at 1,406 million tons, which represents a decrease of 25,78% or 488 103 tons compared to the 1,894 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 990 000 tons, which represents an increase of 9,40% or 85 074 tons compared to the 904 926 tons of the previous marketing year.

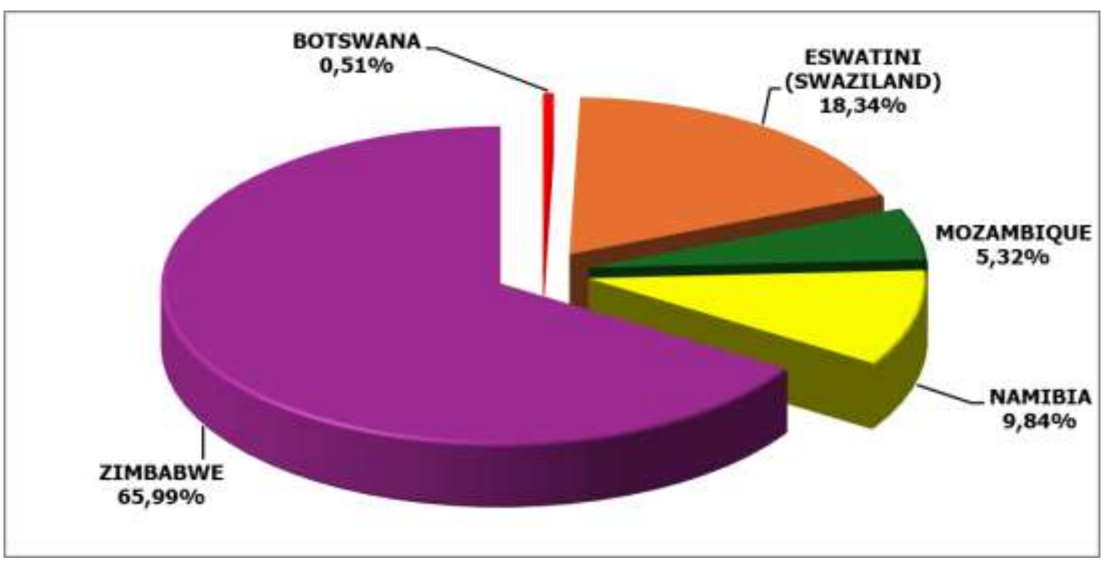
- The exports of white maize for the 2026/27 marketing year are projected at 1,250 million tons, which represents a decrease of 11,06% or 155 500 tons compared to the 1,406 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 1,730 million tons, which represents an increase of 74,75% or 740 000 tons compared to the 990 000 tons of the previous marketing year.

**Graph 3: Major countries of white maize exports from South Africa: 2026/27 marketing year**




- From 25 April to 1 May 2026, progressive white maize exports for the 2026/27 marketing year amount to 20 055 tons, with the main destinations being Zimbabwe (51,05% or 10 238 tons), followed by Botswana (17,64% or 3 538 tons), Namibia (16,49% or 3 308 tons), Lesotho (7,37% or 1 479 tons), Eswathini (Swaziland) (6,36% or 1 276 tons) and Mozambique (1,08% or 216 tons). The imports of white maize for the mentioned period amount to zero.

**Graph 4: Major countries of yellow maize exports from South Africa: 2026/27 marketing year**



- From 25 April to 1 May 2026, progressive yellow maize exports for the 2026/27 marketing year amount to 13 182 tons, with the main destinations being, Zimbabwe (65,99% or 8 699 tons), followed by Eswathini (Swaziland) (18,34% or 2 418 tons), Namibia (9,84% or 1 297 tons), Mozambique (5,32% or 701 tons) and Botswana (0,51% or 67 tons). The imports of yellow maize for the mentioned period are zero.

# 4. Market information

## 4.1 Consumer Price Index (CPI)

- Annual consumer price inflation was 3,1% in March 2026, up from 3,0% in February 2026. The CPI increased by 0,6% month-on-month in March 2026.
- The main contributors to the 3,1% annual inflation rate were:
  - Housing and utilities (5,1% and contributing 1,2%);
  - Food and non-alcoholic beverages (3,6% and contributing 0,6%); and
  - Insurance and financial services (4,6% and contributing 0,5%).
- In March 2026, the annual inflation rate for:
  - Goods was 1,8%, down from 1,9% in February 2026; and
  - Services was 4,2%, up from 3,8% in February 2026.

## 4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 2,3% in March 2026, compared with 1,8% in February 2026. The producer price index (PPI) increased by 1,1% month-on-month in March 2026. The main positive contributors to the headline PPI annual inflation rate were food products, beverages and tobacco products (2,2% and contributing 0,7%) and furniture and other manufacturing (14,1% and contributing 0,6%). The main contributors to the headline PPI monthly inflation rate were coke, petroleum, chemical, rubber and plastic products (2,0% and contributing 0,4%) and food products, beverages and tobacco products (1,0% and contributing 0,3%).
- The annual percentage change in the PPI for intermediate manufactured goods was 9,1% in March 2026, compared with 7,8% in February 2026. The index increased by 1,3% month-on-month. The main positive contributors to the annual rate were basic and fabricated metals (21,9% and contributing 10,4% and sawmilling and wood (8,8% and contributing 0,9%). The main contributors to the monthly rate were basic and fabricated metals (0,9% and contributing 0,5%) and chemicals, rubber and plastic products (1,5% and contributing 0,4%).
- The annual percentage change in the PPI for electricity and water was 17,9% in March 2026, compared with 15,4% in February 2026. The index decreased by 0,2% month-on-month. The contributors to the annual rate were electricity (19,0% and contributing 15,6%) and water (11,6% and contributing 2,1%). The contributor to the monthly rate was electricity (-0,2% and contributing -0,1%).
- The annual percentage change in the PPI for mining was 33,0% in March 2026, compared with 30,3% in February 2026. The index increased by 3,5% month-on-month. The positive contributors to the annual rate were non-ferrous metal ores (57,7% and contributing 25,5%); gold and other metal ores (16,9% and contributing 4,8%); and coal and gas (11,3% and contributing 2,4%). The main positive contributors to the monthly rate were non-ferrous metal ores (3,2% and contributing 1,7%) and coal and gas (10,4% and contributing 1,7%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was -2,9% in March 2026, compared with -5,1% in February 2026. The index decreased by 0,2% month-on-month. The negative contributor to the annual rate was agriculture (-5,0% and contributing -4,3%). The main negative contributor to the monthly rate was agriculture (-0,4% and contributing -0,4%).

## 4.3 Future contract prices

**Table 4: Closing prices on Thursday, 7 May 2026**

| | 7 May 2026 | 7 April 2026 | % Change |
|---|---|---|---|
| **RSA White Maize per ton (May 2026 contract)** | R3 615,00 | R3 264,00 | 10,75 |
| **RSA Yellow Maize per ton (May 2026 contract)** | R3 680,00 | R3 379,00 | 8,91 |
| **RSA Wheat per ton (May 2026 contract)** | R5 850,00 | R5 826,00 | 0,41 |
| **RSA Sunflower seed per ton (May 2026 contract)** | R9 030,00 | R9 053,00 | -0,25 |
| **RSA Soya-beans per ton (May 2026 contract)** | R7 131,00 | R6 946,00 | 2,66 |
| **Exchange rate R/$** | R16,30 | R16,86 | -3,32 |

*Source: JSE/SAFEX*

## 4.4 Agricultural machinery sales

- March 2026 tractor sales of 618 units were almost 8% less than the 671 units sold in March 2025. On a year-to-date basis tractor sales are now approximately 2% up on last year. Twenty-nine combine harvesters were sold in March 2026, eight less than the 37 units sold in March 2025. On a year-to-date basis, combine harvester sales are now approximately 6% up on last year.
- Although market sentiment remains positive, several external factors, such as the value of the rand and the current diesel and fertilizer prices are currently holding farmers back from buying capital equipment. Summer crop production estimates are, in general, good. This is having an adverse effect on commodity prices. Farmers will soon start harvesting and they will then be in a better situation to evaluate conditions going forward into the next cropping season. Industry predictions of tractor sales for the 2026 calendar are that these will be similar, or marginally lower, than those in 2025.

**Table 5: Agricultural machinery sales**

| Equipment class | Year-on-year | | Percentage | Year-to-date | | Percentage |
|---|---|---|---|---|---|---|
| | **March** | | **Change** | **March** | | **Change** |
| | **2026** | **2025** | **%** | **2026** | **2025** | **%** |
| Tractors | 618 | 671 | -7,90% | 1 804 | 1 764 | 2,27% |
| Combine harvesters | 29 | 37 | -21,62% | 65 | 61 | 6,56% |

*Source: SAAMA press release, April 2026*

**PLEASE NOTE:** The Food Security Bulletin for May 2026 will be released on **5 June 2026**.

# 5. Acknowledgements

The Directorate: Statistics and Economic Analysis make use of information sourced from various institutions and organisations within South Africa to compile the monthly report on South Africa's Food Security Situation. This report has been compiled with the aid of information and reports sourced from the following institutions and organisations:

- Agbiz
- Agfacts
- BVG Commodities (Pty) Limited
- Department of Water and Sanitation
- Directorate: Climate Change and Disaster Management at DAFF
- Grain South Africa (Grain SA)
- IGC Grain Market Report
- National Agricultural Marketing Council (NAMC)
- South African Agricultural Machinery Association (SAAMA)
- South African Futures Exchange (SAFEX)
- Statistics South Africa (Stats SA)
- The South African Supply and Demand Estimates Report (SASDE)
- The South African Grain Information Service (SAGIS)
- The South African Weather Service (WeatherSA)
- USDA Foreign Service