MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA APRIL 2025

Issued: 12 May 2025

Directorate: Statistics and Economic Analysis

- **According to the latest Seasonal Climate Watch of the South African Weather Service for the period May to September 2025, the El Niño-Southern Oscillation (ENSO) has recently returned to a neutral state and is predicted to be in a neutral state for the foreseeable future.**
- **The projected closing stocks of wheat for the current 2024/25 marketing year are 728 628 tons, which includes imports of 1,850 million tons. It is also 2,8% less than the previous years' ending stocks.**
- **The expected commercial maize crop for 2025 is 14,664 million tons, which is 14,1% more than the 12,850 million tons of the previous season (2024).**
- **Projected closing stocks of maize for the current 2025/26 marketing year are 1,628 million tons, which is 92,7% more than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the current 2025/26 marketing year are 79 787 tons, which is 7,6% less than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2025/26 marketing year are 62 229 tons, which is 14,5% less than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the current 2025/26 marketing year are 224 779 tons, which is 59,8% more than the previous years' ending stocks.**
- **The annual percentage change in the CPI was lower at 2,7% in March 2025.**
- **The annual percentage change in the PPI for final manufactured goods was lower at 0,5% in March 2025.**
- **April 2025 tractor sales of 527 units were approximately 5% more than the 500 units sold in April 2024.**

agriculture

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1. Weather conditions

1.1 Seasonal Climate Watch

According to the latest Seasonal Climate Watch of the South African Weather Service for the period May to September 2025, the El Niño-Southern Oscillation (ENSO) has recently returned to a neutral state and is predicted to be in a neutral state for the foreseeable future. ENSO, however, has limited influence on the South Africa during the winter seasons and is not expected to have a significant impact.

As early winter is starting in May-June-July, the focus shifts to the south-western parts of the country and the southern and eastern coastal areas. Both the south-western parts and the southern and eastern coastal areas are expected to receive mostly below-normal rainfall early-, mid- and late-winter.

Minimum and maximum temperatures are largely expected to be above-normal for the most parts during the winter season, with the notable exception of the southern coastal areas that are expected to see parts of it be below-normal.

1.2 Level of dams

Available information on the level of South Africa's dams on 5 May 2025 indicates that the country has approximately 99% of its full supply capacity (FSC) available, which is 12,0% more as compared to the corresponding period in 2024. The Northern Cape Province (48%), North West (26%), Free State (19%), Gauteng (13%), KwaZulu-Natal (5%), Limpopo (5%), Mpumalanga (4%) provinces, all show increases in full supply capacity as compared to 2024. However, the Western Cape Province (-4%) show a decrease in full supply capacity as compared to 2024, while Eastern Cape Province remains the same in full supply capacity.

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

Table 1: Level of dams, 5 May 2025

Province	Net FSC million cubic meters	**05/05/2025 (%)**	Last Year (2024) (%)	% Increase/Decrease 2025 vs. 2024
Eastern Cape	1 728	84	84	-
Free State	15 657	106	87	19,0
Gauteng	128	103	90	13,0
Kingdom of Lesotho	2 363	100	95	5,0
Kingdom of Eswatini	334	100	100	-
KwaZulu-Natal	4 910	97	92	5,0
Limpopo	1 485	90	85	5,0
Mpumalanga	2 538	101	97	4,0
North West	866	101	75	26,0
Northern Cape	146	121	73	48,0
Western Cape	1 866	55	59	-4,0
Total	32 021	**99**	**87**	**12,0**

Source: Department of Water and Sanitation

2. Grain production

2.1 Summer grain crops - 2025

The area planted and third production forecast for summer grains for the 2025 season was released by the Crop Estimates Committee (CEC) on 30 April 2025, and is as follows:

Table 2: Commercial summer grains: Area planted and third production forecast- 2025 season

CROP	**Area planted** **2025** **Ha** **(A)**	3rd Forecast 2025 Tons (B)	Area planted 2024 Ha (C)	Final estimate 2024 Tons (D)	Change 2025 vs 2024 % (B) ÷ (D)
Commercial:					
White maize	**1 599 700**	**7 756 700**	1 554 750	6 055 000	28,10%
Yellow maize	**997 000**	**6 907 100**	1 081 500	6 795 000	1,65%
Total Maize	**2 596 700**	**14 663 800**	2 636 250	12 850 000	14,12%
Sunflower seed	**555 700**	**742 800**	529 000	632 000	17,53%
Soybeans	**1 151 000**	**2 330 975**	1 150 500	1 848 000	26,14%
Groundnuts	**48 125**	**64 595**	41 200	52 000	24,22%
Sorghum	**41 150**	**137 970**	42 100	98 000	40,79%
Dry beans	**45 620**	**70 540**	39 550	50 495	39,70%
TOTAL	**4 438 295**	**18 010 680**	4 438 600	15 530 495	15,97%

Note: Estimate is for calendar year, e.g. production season 2024/25 = 2025

- The area estimate for maize is 2 596 700 ha, which is 1,50% or 39 550 ha less than the 2 636 250 ha planted for the previous season.
- The expected **commercial maize** crop is 14 663 800 tons, which is 14,12% or 1 813 800 tons more than the 12 850 000 tons of the previous season (2024). The yield for maize is 5,65 t/ha.
- The area estimate for **white maize** is 1 599 700 ha, which represents an increase of 2,89% or 44 950 ha compared to the 1 554 750 ha planted last season. The production forecast of white maize is 7 756 700 tons, which is 28,10% or 1 701 700 tons more than the 6 055 000 tons of last season. The yield for white maize is 4,85 t/ha.
- In the case of **yellow maize,** the area estimate is 997 000 ha, which is 7,81% or 84 500 ha less than the 1 081 500 ha planted last season. The yellow maize production forecast is 6 907 100 tons, which is 1,65% or 112 100 tons more than the 6 795 000 tons of last season. The yield for yellow maize is 6,93 t/ha.
- The revised area estimate for **sunflower seed** is 555 700 ha, which is 5,05% or 26 700 ha more than the 529 000 ha planted the previous season. The production forecast for sunflower seed is 742 800 tons, which is 17,53% or 110 800 tons more than the 632 000 tons of the previous season. The expected yield is 1,34 t/ha.
- It is estimated that 1 151 000 ha have been planted to **soybeans**, which represents an increase of 0,04% or 500 ha compared to the 1 150 500 ha planted last season. The production forecast is 2 330 975 tons, which is 26,14% or 482 975 tons more than the 1 848 000 tons of the previous season. The expected yield is 2,03 t/ha.
- For **groundnuts**, the area estimate is 48 125 ha, which is 16,81% or 6 925 ha more than the 41 200 ha planted for the previous season. The expected crop is 64 595 tons – which is 24,22% or 12 595 tons more than the 52 000 tons of last season. The expected yield is 1,34 t/ha.
- The area estimate for **sorghum** decreased by 2,26% or 950 ha, from 42 100 ha to 41 150 ha against the previous season. The production forecast for sorghum is 137 970 tons, which is 40,79% or 39 970 tons more than the 98 000 tons of the previous season. The expected yield is 3,35 t/ha.
- For **dry beans**, the area estimate is 45 620 ha, which is 15,35% or 6 070 ha more than the 39 550 ha planted for the previous season. The production forecast is 70 540 tons, which is 39,70% or 20 045 tons more than the 50 495 tons of the previous season. The expected yield is 1,55 t/ha.

Please note that the area planted and fourth production forecast for summer field crops for 2025 will be released on 27 May 2025.

2.2 Winter cereal crops – 2025

The CEC also released the intentions to plant winter cereals for the 2025 season on 30 April 2025.

Table 3: Winter cereals: Intentions to plant – 2025 season

CROP	**Intentions* 2025** **Ha** **(A)**	Area planted 2024 Ha (B)	Final crop 202 Tons (C)	Change % (A) ÷ (D)
Commercial:				
Wheat	**513 200**	505 300	1 924 890	1,56%
Barley	**93 050**	100 700	374 000	-7,60%
Canola	**166 500**	165 750	288 200	0,45%
Oats	**34 520**	31 000	42 800	11,35%
Sweet lupines	**20 700**	16 000	19 200	29,38%
Total winter	**827 970**	818 750	2 649 090	1,13%

* Based on conditions at the middle of April 2025

- The figures for wheat represent the total number of hectares that are intended to be planted for grain, excluding any hectares that will be planted for fodder and grazing.
- Early indications are that producers intend to plant 513 200 ha of **wheat** for the 2025 production season. This is 1,56% or 7 900 ha more than the 505 300 ha planted to wheat in 2024.
- The main producing areas are within the Western Cape with 371 000 ha (72%), followed by the Free State with 55 000 ha (11%) and the Northern Cape with 38 000 ha (7%).
- The expected area planted to **malting barley** is 93 050 ha, which is 7,60% or 7 650 ha less than the 100 700 ha of the previous year.
- The expected area planted to **canola** is also 166 500 ha, which is 0,45% or 750 ha more than the 165 750 ha planted in 2024.
- Producers intend to plant 34 520 ha of **cereal oats**, which is 11,35% or 3 520 ha more than the 31 000 ha of the previous season. The expected area planted to **sweet lupines** is 20 700 ha, which is 29,38% or 4 700 ha more than the previous season.

Please note that the preliminary area estimate of winter crops for 2025 will be released on 29 July 2025.

2.3 Non-commercial maize - 2025

The CEC also released the preliminary area planted and production estimate of the non-commercial maize sector for the 2025 season on 30 April 20245

Table 4: Non-commercial maize: Preliminary area planted and production estimate - 2025 season

CROP	**Area planted 2025** **Ha** **(A)**	**Production 2025** **Tons** **(B)**	Area planted 2024 Ha (C)	Final crop 2024 Tons (D)	Change % (B) ÷ (D)
Non-commercial agriculture:					
White maize	**275 150**	**439 700**	267 570	407 500	7,90
Yellow maize	**82 850**	**181 800**	79 430	167 500	8,54
Maize	**358 000**	**621 500**	347 000	575 000	8,09

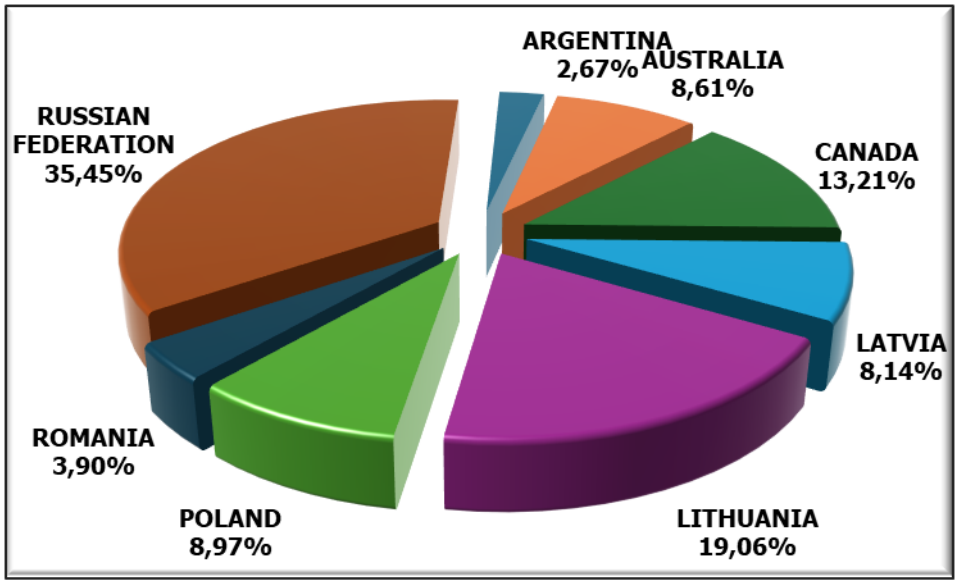
- The area planted to maize in the non-commercial agricultural sector is estimated at 358 000 ha, which represents an increase of 3,17%, compared to the 347 000 ha of the previous season. The expected maize crop for this sector is 621 500 tons, which is 8,09% more than the 575 000 tons of last season. It is important to note that about 46,75% of the maize produced in the non-commercial sector, is planted in the Eastern Cape, followed by KwaZulu-Natal with 20,88% and then Limpopo with 20,65%.

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 APR25 Annexure A.

3.1 Imports and exports of wheat for the 2024/25 marketing year

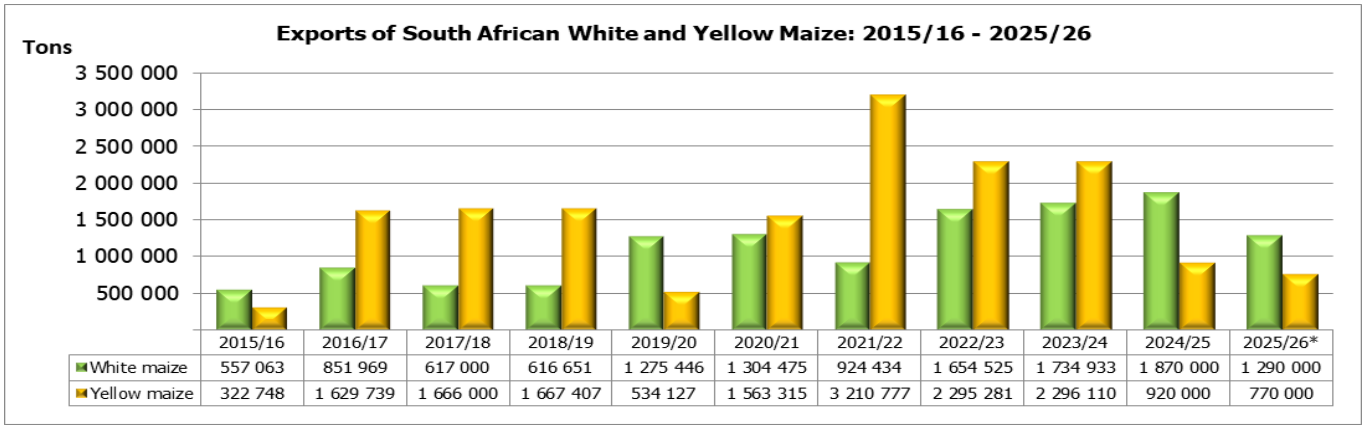
Graph 1: Major countries of wheat imports to South Africa: 2024/25 marketing year



- The progressive wheat imports (human consumption) for the 2024/25 marketing year (28 September 2024 to 2 May 2025) amount to 1 028 253 tons, with 35,45% or 364 493 tons from Russian Federation, followed by 19,06% or 195 954 tons from Lithuania, 13,21% or 135 784 tons from Canada, 8,97% or 92 220 tons from Poland, 8,61% or 88 573 tons from Australia, 8,14% or 83 683 tons from Latvia, 3,90% or 40 113 tons from Romania and 2,67% or 27 433 tons from Argentina. The exports of wheat (human consumption) for the above-mentioned period amount to 115 173 tons, of which 43,27% or 49 833 tons went to Zimbabwe, 25,33% or 29 176 tons went to Zambia, 14,60% or 16 812 tons went to Botswana, 12,06% or 13 894 tons went to Lesotho, and only 4,74% or 5 458 tons went to Namibia.

3.2 Exports of South African white and yellow maize

Graph 2: Exports of South African white and yellow maize: 2015/16 - 2025/26 marketing year

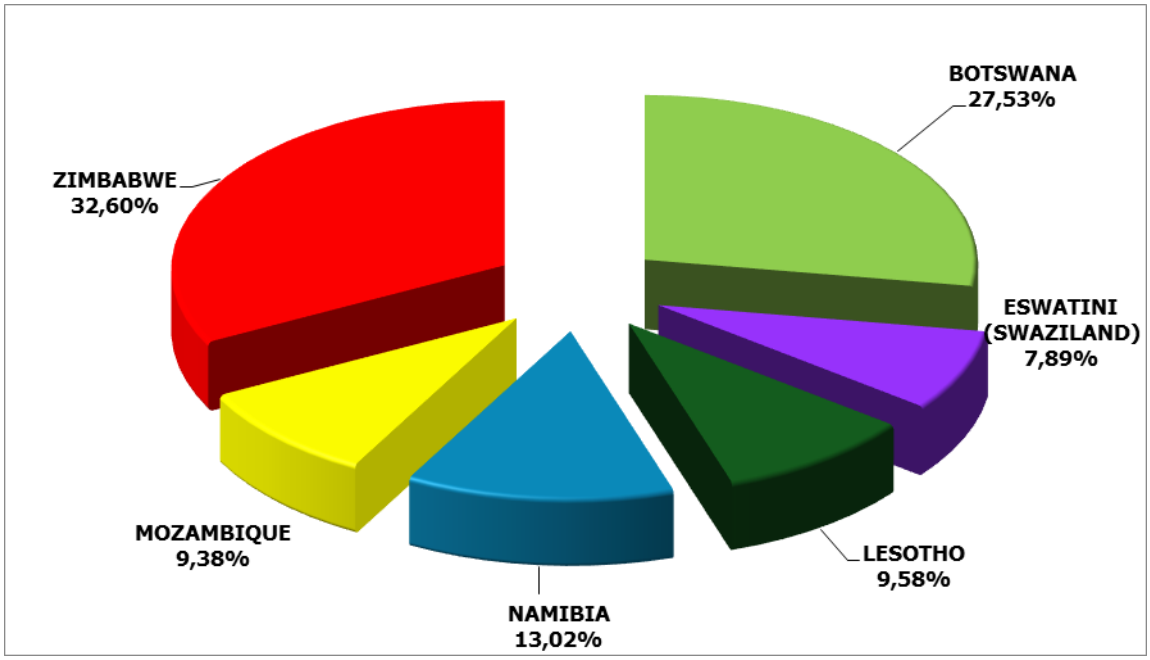


	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26*
White maize	557 063	851 969	617 000	616 651	1 275 446	1 304 475	924 434	1 654 525	1 734 933	1 870 000	1 290 000
Yellow maize	322 748	1 629 739	1 666 000	1 667 407	534 127	1 563 315	3 210 777	2 295 281	2 296 110	920 000	770 000

*Projection

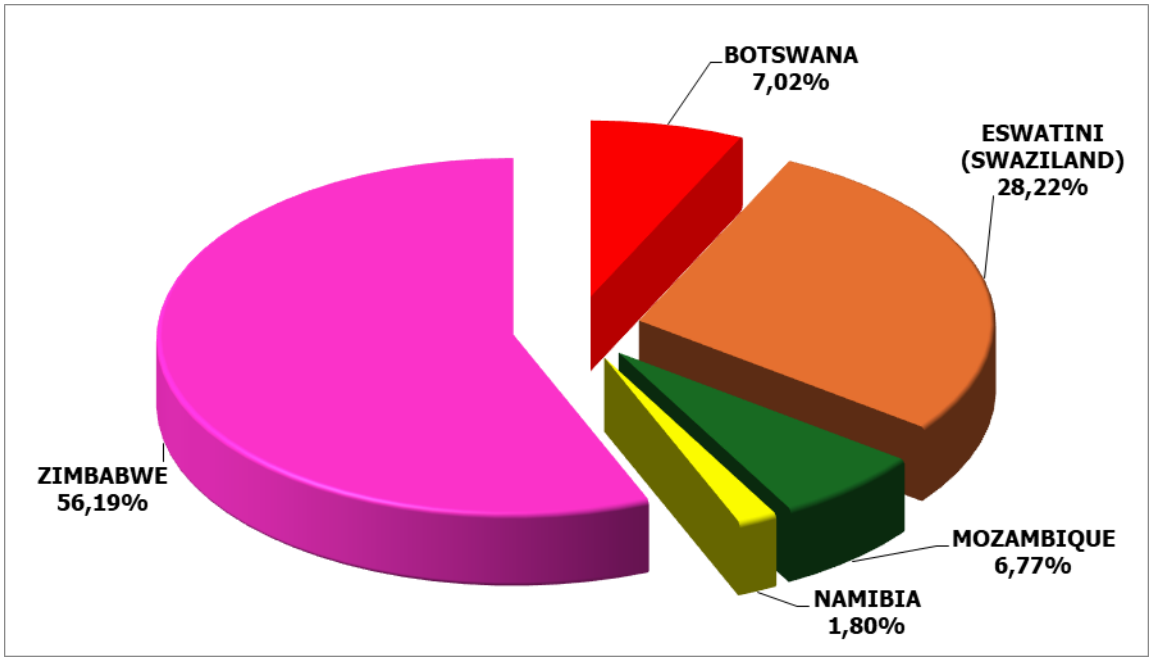
- The exports of white maize for the 2025/26 marketing year are projected at 1,290 million tons, which represents a decrease of 31,02% or 580 000 tons compared to the 1,870 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 770 000 tons, which represents a decrease of 16,30% or 150 000 tons compared to the 920 000 tons of the previous marketing year.

Graph 3: Major countries of white maize exports from South Africa: 2025/26 marketing year



- From 26 April to 2 May 2025, progressive white maize exports for the 2025/26 marketing year amount to 6 491 tons, with the main destinations being Zimbabwe (32,60% or 2 116 tons), followed by Botswana (27,53% or 1 787 tons), Namibia (13,02% or 845 tons), Lesotho (9,58% or 622 tons), Mozambique (9,38% or 609 tons) and Eswathini (Swaziland) (7,89% or 512 tons). The imports of white maize for the mentioned period amount to zero.

Graph 4: Major countries of yellow maize exports from South Africa: 2025/26 marketing year



- From 26 April to 2 May 2025, progressive yellow maize exports for the 2025/26 marketing year amount to 7 654 tons, with the main destinations being, Zimbabwe (56,19% or 4 301 tons), followed by Eswathini (Swaziland) (28,22% or 2 160 tons), Botswana (7,02% or 537 tons), Mozambique (6,77% or 518 tons) and Namibia (1,80% or 138 tons). The imports of yellow maize for the mentioned period amount zero.

4. Market information

4.1 Consumer Price Index (CPI)

- Annual consumer price inflation was 2,7% in March 2025, down from 3,2% in February 2025. The CPI increased by 0,4% month-on-month in March 2025.
- The main positive contributors to the 2,7% annual inflation rate were:
  - housing and utilities (4,4% and contributing 1,0%);
  - food and non-alcoholic beverages (2,7% and contributing 0,5%); and
  - restaurants and accommodation services (4,2% and contributing 0,3%).
- In March 2025, the annual inflation rate for goods was 2,0%, down from 2,5% in February 2025; and services was 3,5%, down from 3,8% in February 2025.

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 0,5% in March 2025, down from 1,0% in February 2025. The producer price index (PPI) increased by 0,6% month-on-month in March 2025. The main contributor to the headline PPI annual inflation rate was food products, beverages and tobacco products (4,1% and contributing 1,2%). The main contributor to the monthly rate was food products, beverages and tobacco products (1,1% and contributing 0,3%).
- The annual percentage change in the PPI for intermediate manufactured goods was 7,4% in March 2025, compared with 8,5% in February 2025. The index increased by 0,1% month-on-month. The main contributors to the annual rate were basic and fabricated metals (10,2% and contributing 5,1%), as well as chemicals, rubber and plastic products (6,9% and contributing 2,0%). The main contributor to the monthly rate was basic and fabricated metals (0,7% and contributing 0,4%).
- The annual percentage change in the PPI for electricity and water was 10,0% in March 2025, compared with 10,8% in February 2025. The index decreased by 2,3% month-on-month. The contributors to the annual rate were electricity (10,8% and contributing 9,2%) and water (5,6% and contributing 0,8%). The contributor to the monthly rate was electricity (-2,7% and contributing -2,3%).
- The annual percentage change in the PPI for mining was 5,9% in March 2025, compared with 2,5% in February 2025. The index increased by 1,4% month-on-month. The positive contributors to the annual rate were gold and other metal ores (16,6% and contributing 4,6%); non-ferrous metal ores (3,8% and contributing 1,9%), as well as stone quarrying, clay and diamonds (38,0% and contributing 1,6%). The main positive contributor to the monthly rate was non-ferrous metal ores (2,8% and contributing 1,4%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was 2,4% in March 2025, compared with 7,6% in February 2025. The index decreased by 2,5% month-on-month. The main contributor to the annual rate was agriculture (2,4% and contributing 2,1%). The main negative contributor to the monthly rate was agriculture (-2,7% and contributing -2,3%).

4.3 Future contract prices

Table 5: Closing prices on Friday, 9 May 2025

	9 May 2025	9 April 2025	% Change
RSA White Maize per ton (May 2025 contract)	R4 559,00	R4 508,00	1,13
RSA Yellow Maize per ton (May 2025 contract)	R4 215,00	R4 336,00	-2,79
RSA Wheat per ton (May 2025 contract)	R6 402,00	R6 387,00	0,23
RSA Sunflower seed per ton (May 2025 contract)	R8 800,00	R8 985,00	-2,06
RSA Soya-beans per ton (May 2025 contract)	R7 268,00	R7 906,00	-8,07
Exchange rate R/$	R18,17	R19,71	-7,81

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- April 2025 tractor sales of 527 units were approximately 5% more than the 500 units sold in April 2024. Year-to-date tractor sales are now almost 22% up on last year. Forty-six combine harvesters were sold in April 2025, 20 more than the 26 units sold in April 2024. On a year-to-date basis, combine harvester sales are now approximately 37% up on last year.
- The late rains have caused problems with harvesting of most summer crops. However, market sentiment is still positive, with farmers waiting to see what the yields and quality of their harvests are going to be once they have harvested their crops. This will delay the whole season, going into soil preparation for the forthcoming summer crops. Sales of agricultural machinery are therefore likely to be delayed because of this. Commodity prices are still holding up in most cases.
- Current predictions are that tractor sales will be similar, or marginally more, than the 6 463 units sold last year. Combine harvester sales in 2025 also look as though they are going to be higher than the 201 machines sold last year.

Table 6: Agricultural machinery sales

Equipment class	Year-on-year		Percentage	Year-to-date		Percentage
	April		**Change**	**April**		**Change**
	2025	**2024**	**%**	**2025**	**2024**	**%**
Tractors	527	500	5,40	2 291	1 883	21,67
Combine harvesters	46	26	76,92	107	78	37,18

Source: SAAMA press release, May 2025

PLEASE NOTE: The Food Security Bulletin for May 2025 will be released on **6 June 2025**.

5. Acknowledgements

The Directorate: Statistics and Economic Analysis makes 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