

MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA AUGUST 2025

Issued: 5 September 2025

Directorate: Statistics and Economic Analysis

- During August 2025, patches of significant rainfall was limited to south-western parts of the Western Cape and isolated patches in Limpopo, Mpumalanga, and Free State.
- The projected closing stocks of wheat for the current 2024/25 marketing year are 675 968 tons, which includes imports of 1,8 million tons. It is also 9,8% less than the previous years' ending stocks.
- The expected commercial wheat crop for 2025 is 2,044 million tons, which is 5,9% more than the 1,930 million tons of the previous season (2024).
- The projected closing stocks of wheat for the coming 2025/26 marketing year are 644 798 tons, which includes imports of 1,740 million tons. It is also 4,6% less than the previous years' ending stocks.
- The expected commercial maize crop for 2025 is 15,802 million tons, which is 23,0% 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 2,416 million tons, which is 269,5% more than the previous years' ending stocks.
- The projected closing stocks of sorghum for the current 2025/26 marketing year are 78 997 tons, which is 8,6% less than the previous years' ending stocks.
- The projected closing stocks of sunflower seed for the current 2025/26 marketing year are 70 139 tons, which is 3,6% less than the previous years' ending stocks.
- The projected closing stocks of soybeans for the current 2025/26 marketing year are 407 029 tons, which is 189,3% more than the previous years' ending stocks.
- The annual percentage change in the CPI was higher at 3,5% in July 2025.
- The annual percentage change in the PPI for final manufactured goods was higher at 1,5% in July 2025.
- August 2025 tractor sales of 700 units were 22% more than the 572 units sold in August 2024.



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1. Weather conditions

1.1 Rainfall for August 2025

During August 2025, patches of significant rainfall was limited to south-western parts of the Western Cape and isolated patches in Limpopo, Mpumalanga, and Free State (**Figure 1**). Comparing rainfall totals to the long-term average for August 2025, rainfall received was above normal over the northern regions of the Northern Cape, western areas of North West, central parts of the Eastern Cape, parts of Limpopo, western parts of Mpumalanga and north-eastern areas of the Free State (**Figure 2**). (Source: Directorate: Climate Change and Disaster Management of Department: Agriculture).

Figure 1: Rainfall (mm) for August 2025

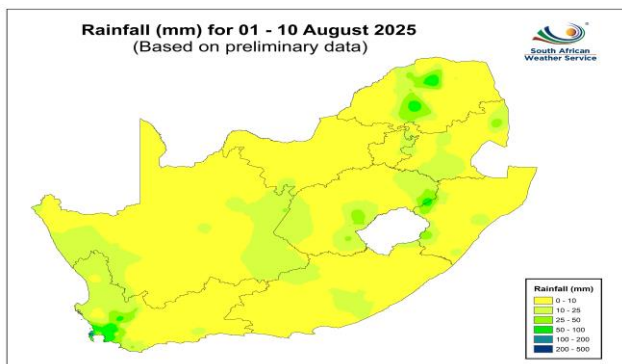
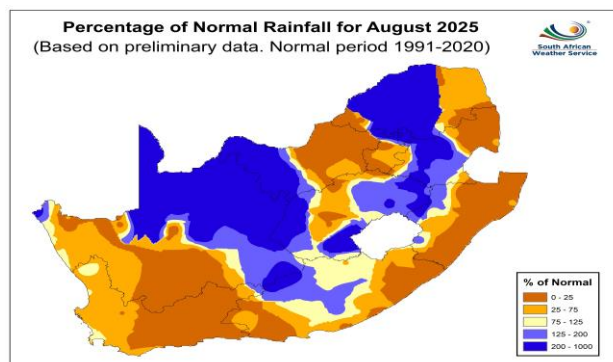


Figure 2: Percentage rainfall for August 2025



1.2 Level of dams

Available information on the level of South Africa's dams on 1 September 2025 indicates that the country has approximately 96% of its full supply capacity (FSC) available, which is 14,0% more as compared to the corresponding period in 2024. The North West Province (30%), Free State (20%), Northern Cape (18%), Gauteng (12%), KwaZulu-Natal (11%), Limpopo and Mpumalanga (9%), and Eastern Cape (2%) all show increases in the full supply capacity as compared to 2024. However, the Western Cape Province (-11%) shows a decrease in the full supply capacity as compared to 2024.

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

Table 1: Level of dams, 1 September 2025

Province	Net FSC million cubic meters	01/09/2025 (%)	Last Year (2024) (%)	% Increase/Decrease 2025 vs. 2024
Kingdom of Eswatini	334	93	88	5,0
Eastern Cape	1 728	81	79	2,0
Free State	15 657	100	80	20,0
Gauteng	128	100	88	12,0
KwaZulu-Natal	4 910	96	85	11,0
Kingdom of Lesotho	2 363	92	80	12,0
Limpopo	1 485	85	76	9,0
Mpumalanga	2 538	97	88	9,0
Northern Cape	146	89	71	18,0
North West	866	98	68	30,0
Western Cape	1 866	85	96	-11,0
Total	32 021	96	82	14,0

Source: Department of Water and Sanitation

2. Grain production

2.1 Summer grain crops - 2025

The area planted and seventh production forecast for summer grains for the 2025 season was released by the Crop Estimates Committee (CEC) on 27 August 2025, and is as follows:

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

CROP	Area planted	7 th Forecast	Area planted	Final estimate	Change
	2025 Ha (A)	2025 Tons (B)	2024 Ha (C)	2024 Tons (D)	2025 vs 2024 % (B) ÷ (D)
Commercial:					
White maize	1 599 700	8 081 350	1 554 750	6 055 000	33,47%
Yellow maize	997 000	7 720 900	1 081 500	6 795 000	13,63%
Total Maize	2 596 700	15 802 250	2 636 250	12 850 000	22,97%
Sunflower seed	555 700	708 300	529 000	632 000	12,07%
Soybeans	1 151 000	2 753 125	1 150 500	1 848 000	48,98%
Groundnuts	48 125	61 389	41 200	52 000	18,06%
Sorghum	41 150	137 970	42 100	98 000	40,79%
Dry beans	45 620	86 407	39 550	50 495	71,12%
TOTAL	4 438 295	19 549 440	4 438 600	15 530 495	25,88%

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 15 802 250 tons, which is 22,97% or 2 952 250 tons more than the 12 850 000 tons of the previous season (2024). The yield for maize is 6,09 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 8 081 350 tons, which is 33,47% or 2 026 350 tons more than the 6 055 000 tons of last season. The yield for white maize is 5,05 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 7 720 900 tons, which is 13,63% or 925 900 tons more than the 6 795 000 tons of last season. The yield for yellow maize is 7,74 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 708 300 tons, which is 12,07% or 76 300 tons more than the 632 000 tons of the previous season. The expected yield is 1,27 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 2 753 125 tons, which is 48,98% or 905 125 tons more than the 1 848 000 tons of the previous season. The expected yield is 2,39 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 61 389 tons – which is 18,06% or 9 389 tons more than the 52 000 tons of last season. The expected yield is 1,28 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 86 407 tons, which is 71,12% or 35 912 tons more than the 50 495 tons of the previous season. The expected yield is 1,89 t/ha.

Please note that the area planted and eighth production forecast for summer field crops for 2025 will be released on 30 September 2025.

2.2 Winter cereal crops – 2025

The CEC also released revised area planted estimate and first production forecast for winter cereals for 2025 on 27 August 2025.

Table 3: Winter cereals: Revised area planted estimate and first production forecast - 2025 season

CROP	Area planted 2025	1 st forecast 2025	Area planted 2024	Final crop 2024	Change
	Ha (A)	Tons (B)	Ha (C)	Tons (D)	% (B) ÷ (D)
Commercial¹⁾:					
Wheat	511 700	2 043 530	505 300	1 930 000	5,9%
Barley	98 950	352 675	100 700	372 250	-5,3%
Canola	174 515	320 043	165 750	290 400	10,2%
Oats	35 520	57 213	31 000	43 400	31,8%
Sweet lupines	21 000	23 100	16 000	19 200	20,3%
Total winter	841 685	2 796 561	818 750	2 655 250	5,3%

1) Commercial only. Excluding barley or oats used as pasture, silage, hay and/or on the farm as fodder for livestock

- The expected production of **wheat** is 2,044 million tons, which is 5,88 % or 113 530 tons more than the previous seasons' crop of 1,930 million tons, whilst the expected yield is 3,99 t/ha.
- The area estimate for wheat was revised to 511 700 ha, which is 800 ha less than the 512 500 ha of the previous forecast. An estimated 363 000 ha or 71 % is planted in the Western Cape, 55 000 ha or 11 % in the Free State and 39 500 ha or 8 % in the Northern Cape.
- The production forecast for **barley** is 352 675 tons, which is 5,26% or 19 575 tons less than the previous seasons' crop of 372 250 tons. The area planted is estimated at 98 950 ha, while the expected yield is 3,56 t/ha.
- The expected **canola crop** is 320 043 tons, which is 10,21% or 29 643 tons more than the previous seasons' crop of 290 400 tons. This is the largest canola crop on record. The area estimate for canola is 174 515 ha, with an expected yield of 1,83 t/ha.
- The expected crop for **oats** for the 2025 season is 57 213 tons and the revised area planted is 35 520 ha. The expected yield is 1,61 t/ha.
- In the case of **sweet lupines**, the production forecast is 23 100 tons. The area estimate of sweet lupines is 21 000 ha, with an expected yield of 1,10 t/ha.

Please note that the revised area planted estimate and second production forecast for winter cereals for 2025 will be released on 30 September 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 2024

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

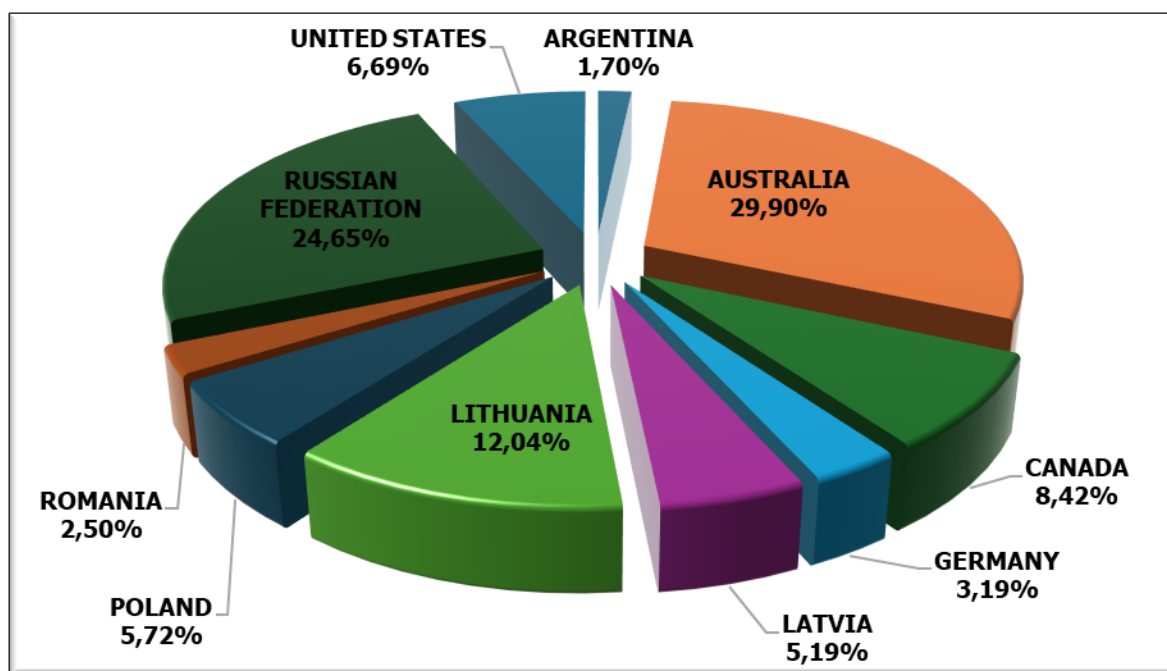
- The area planted to maize in the non-commercial agricultural sector is estimated at 358 000 ha, which represents an increase of 3,17%, compared to the 347 000 ha of the previous season. The expected maize crop for this sector is 621 500 tons, which is 8,09% more than the 575 000 tons of last season. 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 AUG25 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

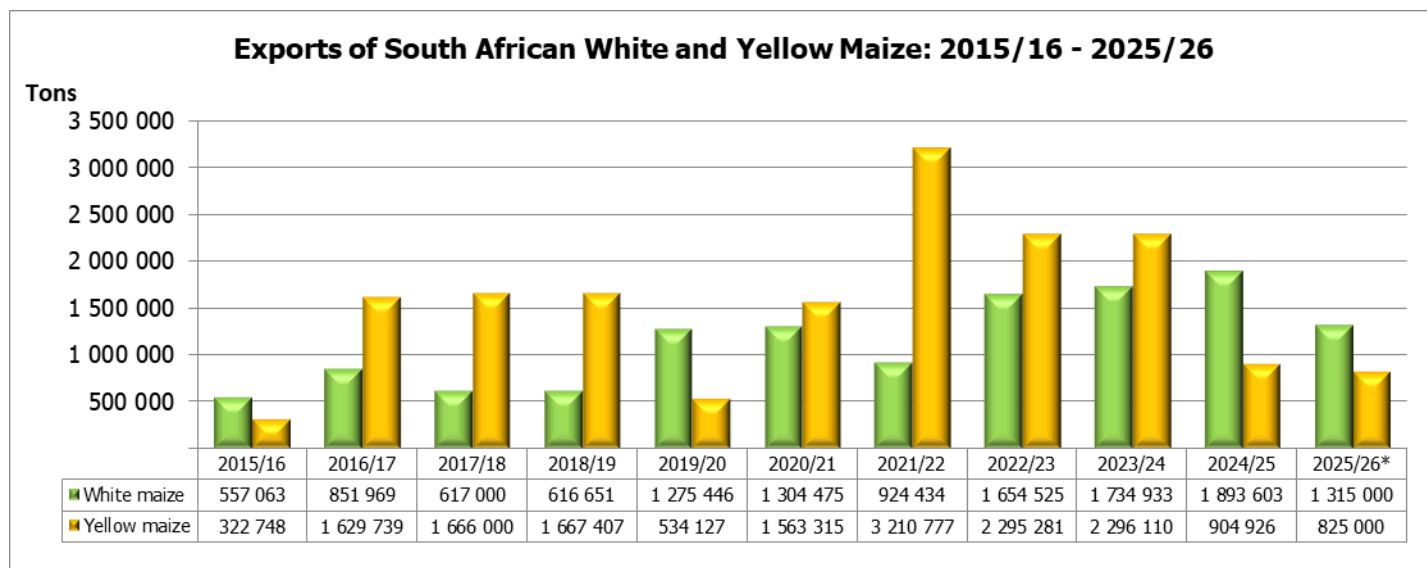


- The progressive wheat imports (human consumption) for the 2024/25 marketing year (28 September 2024 to 29 August 2025) amount to 1 612 942 tons, with 29,90% or 482 317 tons from Australia, followed by 24,65% or 397 557 tons from Russian Federation, 12,04% or 194 149 tons from Lithuania, 8,42% or 135 876 tons from Canada, 6,69% or 107 884 tons from the United States, 5,72% or 92 326 tons from Poland, 5,19% or 83 678 tons from Latvia, 3,19% or 51 437 tons from Germany, 2,50% or 40 314 tons from Romania and only 1,70% or 27 404 tons from Argentina. The exports of wheat (human consumption) for the above-mentioned period amount to 211 602 tons, of which 40,58% or 85 860 tons went to Zambia, 32,03% or 67 784 tons went to Zimbabwe, 27,27% or 57 708 tons went to BLNS countries (Botswana, Lesotho, Namibia and Eswatini (former Swaziland)), and only 0,12% or 250 tons went to Mozambique.



3.2 Exports of South African white and yellow maize

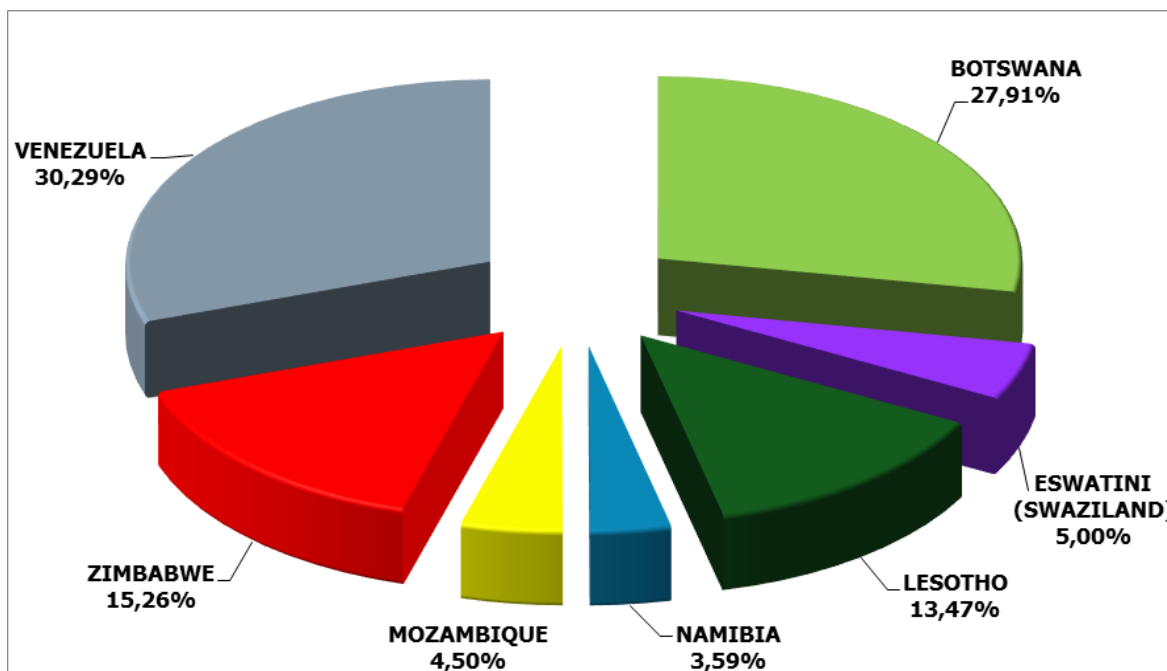
Graph 2: Exports of South African white and yellow maize: 2015/16 - 2025/26 marketing year



*Projection

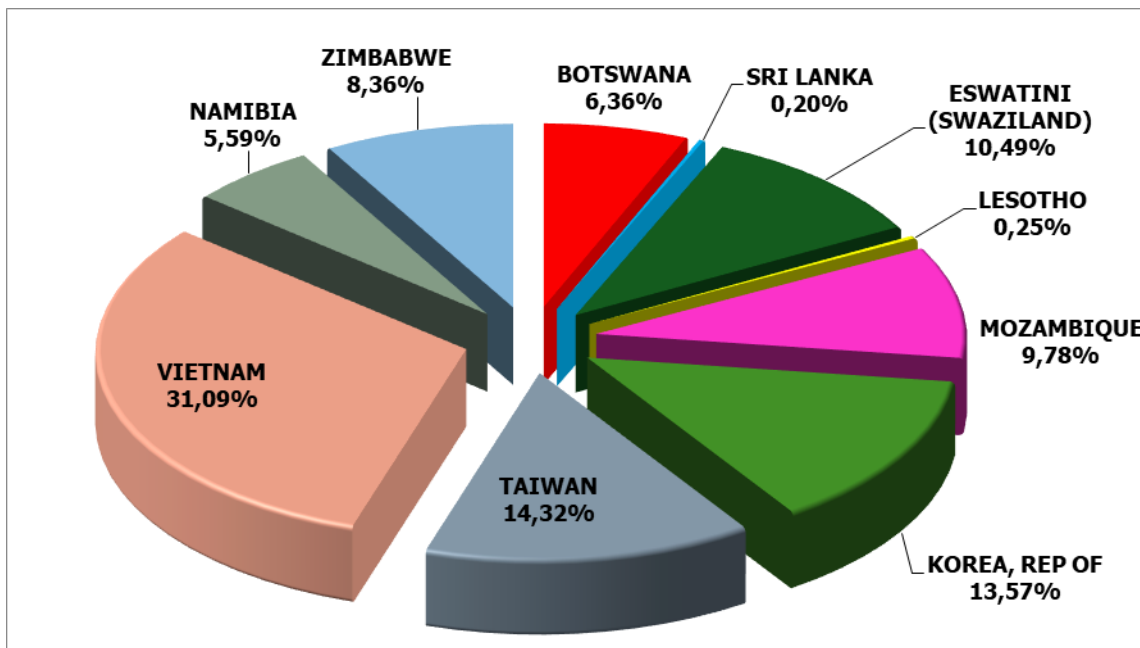
- The exports of white maize for the 2025/26 marketing year are projected at 1,315 million tons, which represents a decrease of 30,56% or 578 603 tons compared to the 1,894 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 825 000 tons, which represents a decrease of 8,83% or 79 926 tons compared to the 904 926 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 29 August 2025, progressive white maize exports for the 2025/26 marketing year amount to 217 904 tons, with the main destinations being Venezuela (30,29% or 65 999 tons), followed by Botswana (27,91% or 60 807 tons), Zimbabwe (15,26% or 33 248 tons), Lesotho (13,47% or 29 343 tons), Eswathini (Swaziland) (5,00% or 10 886 tons), Mozambique (4,50% or 9 805 tons) and Namibia (3,59% or 7 816 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 29 August 2025, progressive yellow maize exports for the 2025/26 marketing year amount to 351 016 tons, with the main destinations being, Vietnam (31,09% or 109 120 tons), followed by Taiwan (14,32% or 50 255 tons), Republic of Korea (13,57% or 47 633 tons), Eswathini (Swaziland) (10,49% or 36 825 tons), Mozambique (9,78% or 34 320 tons), Zimbabwe (8,36% or 29 358 tons), Namibia (5,59% or 19 616 tons), Botswana (6,36% or 22 308 tons), Lesotho (0,25% or 868 tons) and Sri Lanka (0,20% or 713 tons). The imports of yellow maize for the mentioned period 51 162 tons, 100% from Argentina.

4. Market information

4.1 Consumer Price Index (CPI)

- Annual consumer price inflation was 3,5% in July 2025, up from 3,0% in June 2025. The CPI increased by 0,9% month-on-month in July 2025.
- The main contributors to the 3,5% annual inflation rate were:
 - Food and non-alcoholic beverages (5,7% and contributing 1,0%) and
 - Housing and utilities (4,3% and contributing 1,0%).
- In July 2025, the annual inflation rate for goods was 3,2%, up from 2,3% in June 2025; and services was 3,6%, down from 3,7% in June 2025.

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 1,5% in July 2025, compared with 0,6% in June 2025. The producer price index (PPI) increased by 0,7% month-on-month in July 2025. The main positive contributor to the headline PPI annual inflation rate was food products, beverages and tobacco products (3,9% and contributing 1,1%). The main positive contributors to the monthly rate were coke, petroleum, chemical, rubber and plastic products (1,3% and contributing 0,3%) and paper and printed products (2,5% and contributing 0,2%).
- The annual percentage change in the PPI for intermediate manufactured goods was 6,4% in July 2025, compared with 5,5% in June 2025. The index increased by 0,6% month-on-month. The main positive contributor to the annual rate was basic and fabricated metals (12,5% and contributing 6,3%). The main contributor to the monthly rate was basic and fabricated metals (2,0% and contributing 1,0%).
- The annual percentage change in the PPI for electricity and water was 4,9% in July 2025, compared with 10,7% in June 2025. The index increased by 3,8% month-on-month. The contributors to the annual rate were

electricity (3,7% and contributing 3,4%) and water (11,6% and contributing 1,2%). The contributors to the monthly rate were electricity (3,1% and contributing 2,7%) and water (10,4% and contributing 1,1%).

- The annual percentage change in the PPI for mining was 7,5% in July 2025, compared with 4,8% in June 2025. The index increased by 2,6% month-on-month. The positive contributors to the annual rate were gold and other metal ores (19,9% and contributing 5,2%); non-ferrous metal ores (5,2% and contributing 2,8%); and stone quarrying, clay and diamonds (30,0% and contributing 1,3%). The main positive contributor to the monthly rate was non-ferrous metal ores (5,5% and contributing 2,8%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was 6,5% in July 2025, compared with 5,0% in June 2025. The index decreased by 1,3% month-on-month. The main contributors to the annual rate were agriculture (6,6% and contributing 5,7%) and fishing (8,3% and contributing 0,7%). The contributor to the monthly rate was agriculture (-1,5% and contributing -1,3%).

4.3 Future contract prices

Table 5: Closing prices on Monday, 1 September 2025

	1 September 2025	1 August 2025	% Change
RSA White Maize per ton (Sep. 2025 contract)	R3 842,00	R4 713,00	-18,48
RSA Yellow Maize per ton (Sep. 2025 contract)	R3 633,00	R4 129,00	-12,01
RSA Wheat per ton (Sep. 2025 contract)	R6 333,00	R6 712,00	-5,65
RSA Sunflower seed per ton (Sep. 2025 contract)	R10 162,00	R9 792,00	3,78
RSA Soya-beans per ton (Sep. 2025 contract)	R7 370,00	R7 330,00	0,54
Exchange rate R/\$	R17,57	R18,30	-3,99

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- August 2025 tractor sales of 700 units were 22% more than the 572 units sold in August 2024. Year-to-date tractor sales are now approximately 23% up on last year. Five combine harvesters were sold in August 2025, the same number as were sold in August 2024. On a year-to-date basis, combine harvester sales are now almost 26% up on last year.
- Sentiment in the market remains positive and this is reflected in the good sales of tractors and combine harvesters currently being experienced. The recently released winter crop estimates indicate that production of all these crops, with the exception of barley, will be significantly higher than last year. Harvesting of summer crops was much delayed this year, but yields have, in the main, been good. Prospects for the forthcoming summer cropping season look favourable.
- Current predictions are still that tractor sales will be between 10 and 15% more than last year. Combine harvester sales in 2025 also look as though they are going to be higher than last year.

Table 6: Agricultural machinery sales

Equipment class	Year-on-year		Percentage Change %	Year-to-date		Percentage Change %
	August			August		
	2025	2024	2025	2024		
Tractors	700	572	22,37	5 015	4 071	23,19
Combine harvesters	5	5	-	172	137	25,55

Source: SAAMA press release, September 2025

PLEASE NOTE: The Food Security Bulletin for September 2025 will be released on **8 October 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