MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA DECEMBER 2025

Issued: 16 January 2026

Directorate: Statistics and Economic Analysis

- **During December 2025, significant rainfall events occurred in the central and eastern regions of the country.**
- **The expected commercial wheat crop for 2025 is 1,987 million tons, which is 2,9% more than the 1,930 million tons of the previous season (2024).**
- **The projected closing stocks of wheat for the 2025/26 marketing year are 509 574 tons, which includes imports of 1,750 million tons. It is also 21,7% less than the previous years' ending stocks.**
- **The expected commercial maize crop for 2025 is 16,436 million tons, which is 27,9% 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 2,465 million tons, which is 277,1% more than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the current 2025/26 marketing year are 75 842 tons, which is 12,2% less than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2025/26 marketing year are 51 359 tons, which is 29,4% less than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the current 2025/26 marketing year are 421 969 tons, which is 199,9% more than the previous years' ending stocks.**
- **The annual percentage change in the CPI was lower at 3,5% in November 2025.**
- **The annual percentage change in the PPI for final manufactured goods was unchanged at 2,9% in November 2025.**
- **December 2025 tractor sales of 494 units were 11% more than the 444 units sold in December 2024.**

agriculture

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Contents

1. Weather conditions

1.1 Rainfall for December 2025

During December 2025, significant rainfall events occurred in the central and eastern regions of the country (**Figure 1**). Comparing rainfall totals to the long-term average for December 2025, above-normal rainfall was received in the northern and south-eastern parts of the Northern Cape, southern Free State and the eastern parts of Limpopo (**Figure 2**). The remainder of the country received normal to below-normal rainfall. (Source: Directorate: Climate Change and Disaster Management of Department: Agriculture).

Figure 1: Rainfall (mm) for December 2025

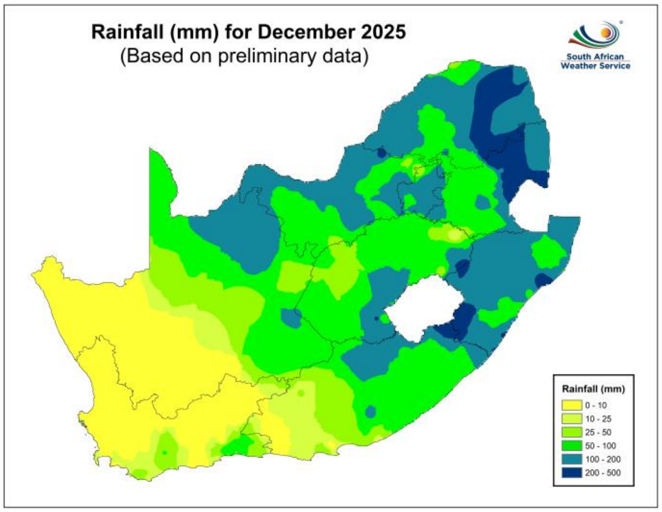
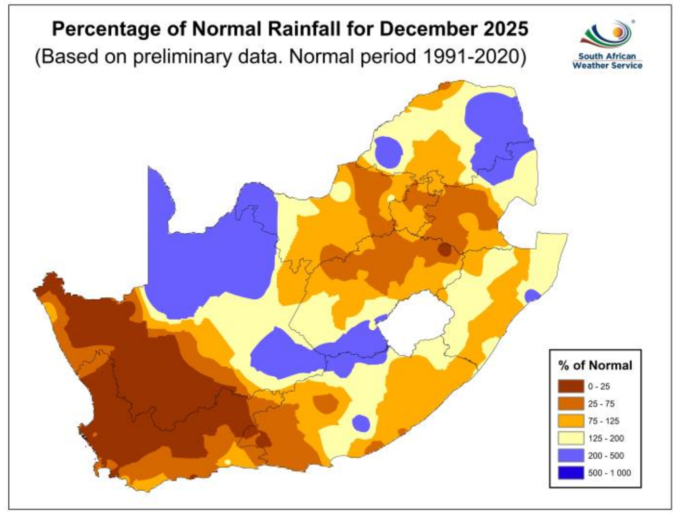


Figure 2: Percentage rainfall for December 2025



1.2 Level of dams

Available information on the level of South Africa's dams on 12 January 2026 indicates that the country has approximately 94% of its full supply capacity (FSC) available, which is 16,0% more as compared to the corresponding period in 2025. The Northern Cape (30%), Free State (28%), North West (27%), Gauteng (14%), Mpumalanga (10%), Limpopo (10%) and KwaZulu-Natal (5%) all show increases in the full supply capacity as compared to 2025. However, the Western Cape (-22%) and Eastern Cape Province (-6%), show a decrease in the full supply capacity as compared to 2025.

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

Table 1: Level of dams, 12 January 2026

Province	Net FSC million cubic meters	12/01/2026 (%)	Last Year (2025) (%)	% Increase/Decrease 2026 vs. 2025
Eastern Cape	1 728	75	81	-6,0
Free State	15 657	99	71	28,0
Gauteng	128	102	88	14,0
Kindom of Lesotho	2 363	100	86	14,0
Kingdom of Eswatini	334	101	97	4,0
Kwazulu-Natal	4 910	94	89	5,0
Limpopo	1 485	90	80	10,0
Mpumalanga	2 538	101	91	10,0
North West	866	97	70	27,0
Northern Cape	146	99	69	30,0
Western Cape	1 866	59	81	-22,0
Total	32 021	**94**	78	16,0

Source: Department of Water and Sanitation

2. Grain production

2.1 Summer grain crops - 2026

Please note that the preliminary area planted estimate for summer field crops for 2026 will be released on 27 January 2026.

2.2 Winter cereal crops – 2025

The CEC released area planted estimate and fifth production forecast for winter cereals for 2025 on 18 December 2025.

Table 2: Winter cereals: Area planted estimate and fifth production forecast - 2025 season

CROP	**Area planted 2025 Ha (A)**	**5th forecast 2025 Tons (B)**	Area planted 2024 Ha (C)	Final crop 2024 Tons (D)	Change % (B) ÷ (D)
Commercial[1]:					
Wheat	**517 300**	**1 986 680**	505 300	1 930 000	2,94%
Barley	**96 950**	**350 730**	100 700	372 250	-5,78%
Canola	**174 515**	**311 850**	165 750	290 400	7,39%
Oats	**35 520**	**48 543**	31 000	43 400	11,85%
Sweet lupines	**21 000**	**21 000**	16 000	19 200	9,38%
Total winter	**845 285**	**2 718 803**	818 750	2 655 250	2,39%

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 1 986 680 tons, which is 2,94% or 56 680 tons more than the previous seasons' crop of 1 930 000 tons, whilst the expected yield is 3,84 t/ha.
- The area estimate for wheat is to 517 300 ha, with an estimated 363 000 ha or 70% is planted in the Western Cape, 57 000 ha or 11% in the Free State and 40 000 ha or 8% in the Northern Cape.
- The production forecast for **barley** is 350 730 tons, which is 5,78% or 21 520 tons less than the previous seasons' crop of 372 250 tons. The area planted is estimated at 96 950 ha, while the expected yield is 3,62 t/ha.
- The expected **canola crop** is 311 850 tons, which is 7,39% or 21 450 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 1,79 t/ha.
- The expected crop for **oats** for the 2025 season is 48 543 tons and the area planted is 35 520 ha. The expected yield is 1,37 t/ha.
- In the case of **sweet lupines,** the production forecast is 21 000 tons. The area estimate of sweet lupines is 21 000 ha, with an expected yield of 1,00 t/ha.

Please note that the area planted estimate and sixth production forecast for winter cereals for 2025 will be released on 27 January 2026.

2.3 Non-commercial maize - 2026

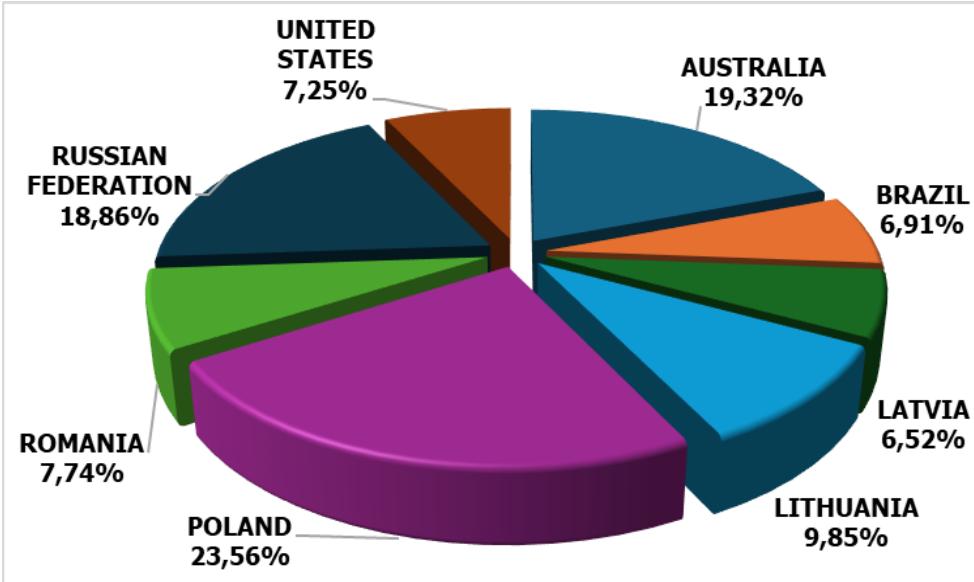
Please note that the preliminary area planted and production estimate of the non-commercial maize sector for the 2026 season will be published on 23 April 2026.

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 DEC25 Annexure A.

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

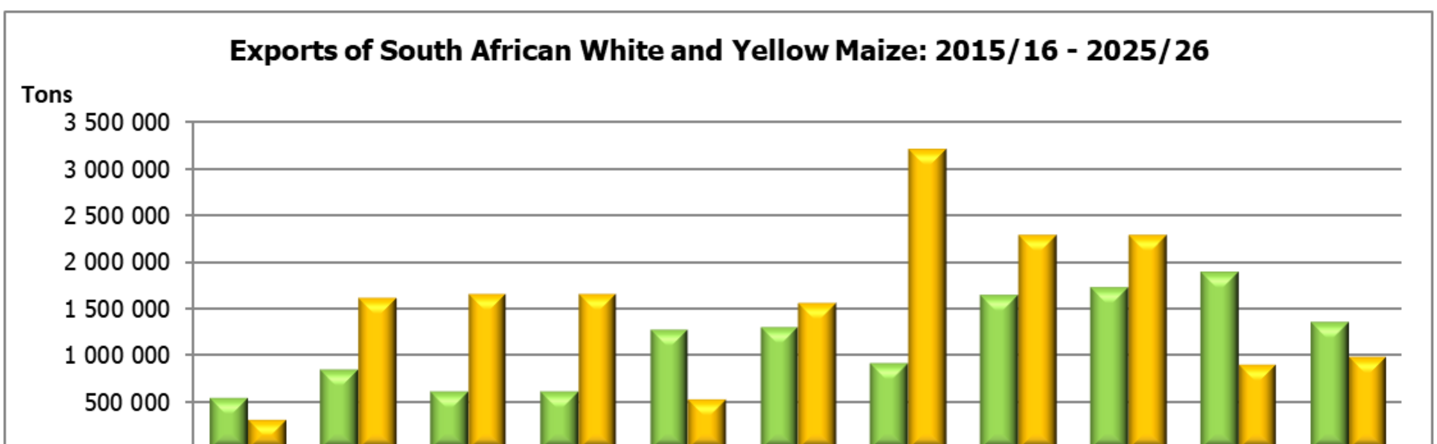
Graph 1: Major countries of wheat imports to South Africa: 2025/26 marketing year



The progressive wheat imports (human consumption) for the 2025/26 marketing year (27 September 2025 to 9 January 2026) amount to 458 793 tons, with 23,56% or 108 070 tons from Poland, followed by 19,32% or 88 628 tons from Australia, 18,86% or 86 518 tons from Russian Federation, 9,85% or 45 201 tons from Lithuania, 7,74% or 35 509 tons from Romania, 7,25% or 33 244 tons from the United States, 6,91% or 31 710 tons from Brazil and 6,52% or 29 913 tons from Latvia. The exports of wheat (human consumption) for the above-mentioned period amount to 6 039 tons, of which 41,91% or 2 531 tons went to Zimbabwe, 40,34% or 2 436 tons went to Lesotho, 12,34% or 745 tons went to Botswana, 4,79% or 289 tons went to Zambia and only 0,64% or 38 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

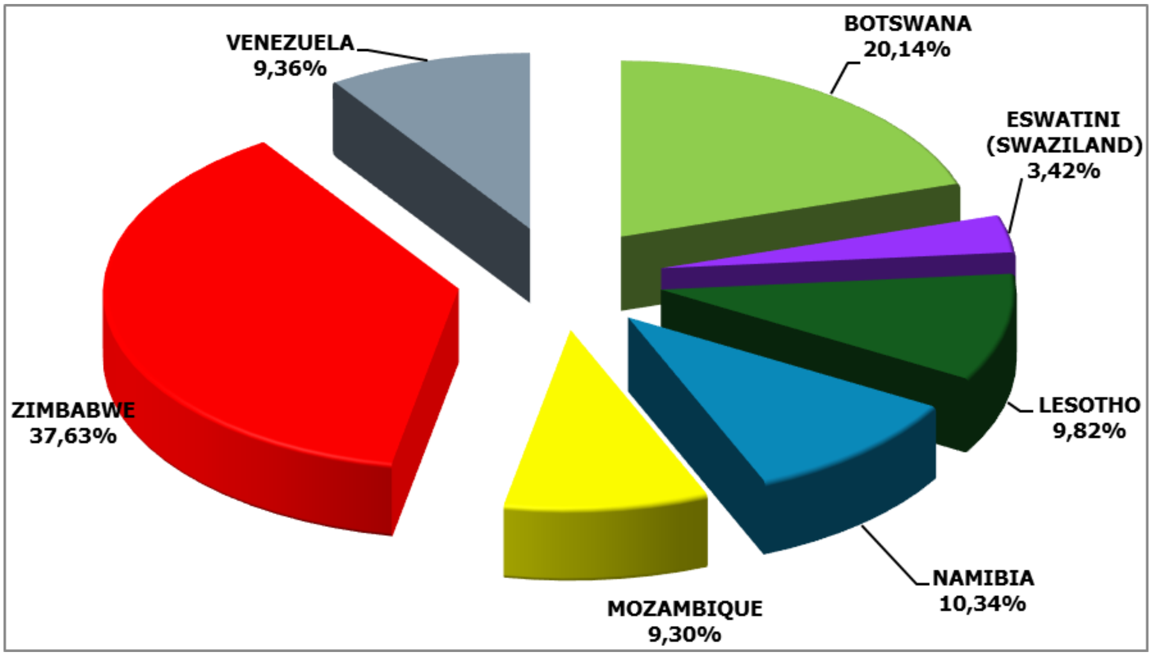


	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26*
White maize	557 063	851 969	617 000	616 651	1 275 446	1 304 475	924 434	1 654 525	1 734 933	1 893 603	1 365 000
Yellow maize	322 748	1 629 739	1 666 000	1 667 407	534 127	1 563 315	3 210 777	2 295 281	2 296 110	904 926	993 000

*Projection

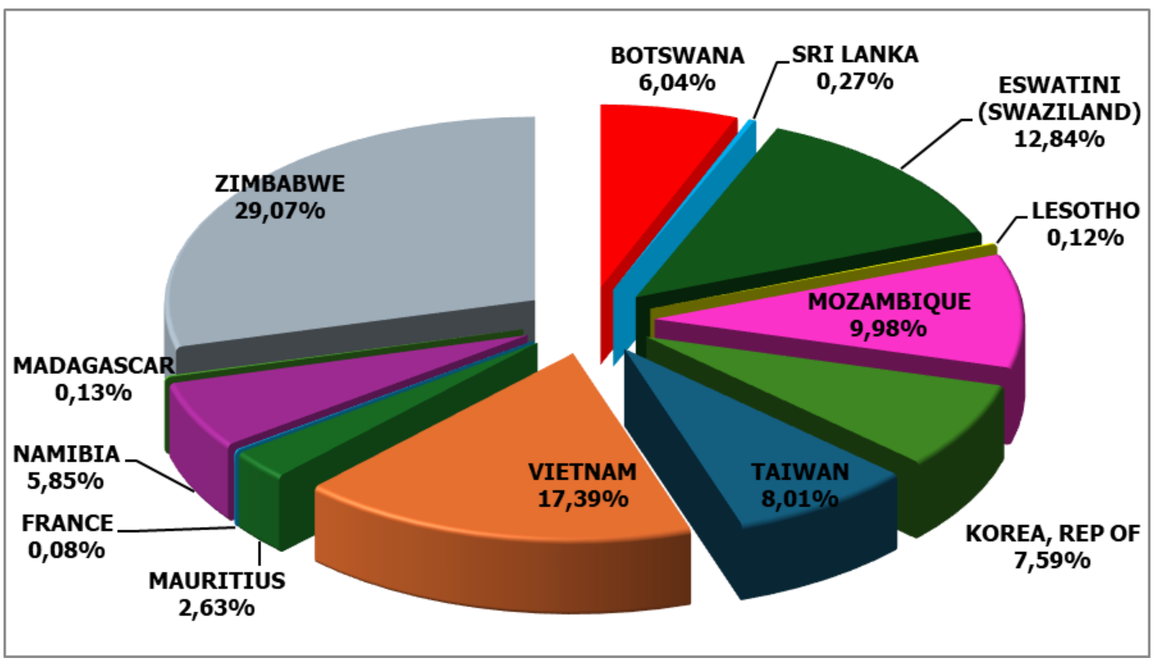
- The exports of white maize for the 2025/26 marketing year are projected at 1,365 million tons, which represents a decrease of 27,92% or 528 603 tons compared to the 1,894 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 993 000 tons, which represents an increase of 9,73% or 88 074 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 2025 to 9 January 2026, progressive white maize exports for the 2025/26 marketing year amount to 704 954 tons, with the main destinations being Zimbabwe (37,63% or 265 249 tons), followed by Botswana (20,14% or 141 959 tons), Namibia (10,34% or 72 859 tons), Venezuela (9,36% or 66 001 tons), Mozambique (9,30% or 65 529 tons), Lesotho (9,82% or 69 236 tons) and Eswathini (Swaziland) (3,42% or 24 121 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 2025 to 9 January 2026, progressive yellow maize exports for the 2025/26 marketing year amount to 627 462 tons, with the main destinations being, Zimbabwe (29,07% or 182 409 tons), followed by

Vietnam (17,39% or 109 120 tons), Eswathini (Swaziland) (12,84% or 80 590 tons), Mozambique (9,98% or 62 600 tons), Taiwan (8,01% or 50 255 tons), Republic of Korea (7,59% or 47 633 tons), Botswana (6,04% or 37 925 tons), Namibia (5,85% or 36 700 tons), Mauritius (2,63% or 16 504 tons), Sri Lanka (0,27% or 1 712 tons), Madagascar (0,13% or 796 tons), Lesotho (0,12% or 738 tons) and France (0,08% or 480 tons). The imports of yellow maize for the mentioned period 110 447 tons, 100% from Argentina.

4. Market information

4.1 Consumer Price Index (CPI)

- Annual consumer price inflation was 3,5% in November 2025, down from 3,6% in October 2025. The CPI decreased by 0,1% month-on-month in November 2025.
- The main contributors to the 3,5% annual inflation rate were housing and utilities (4,5% and contributing 1,1%) and food and non-alcoholic beverages (4,4% and contributing 0,8%).
- The main contributors to the 3,5% annual inflation rate were:
  - Goods were 2,9%, down from 3,1% in October 2025; and
  - Services were 4,1%, up from 4,0% in October 2025.

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 2,9% in November 2025, the same rate as in October 2025. The producer price index (PPI) remained unchanged month-on-month.
- The main positive contributors to the headline PPI annual inflation rate were food products, beverages and tobacco products (3,3% and contributing 1,0%) and furniture and other manufacturing (11,1% and contributing 0,5%).
- The annual percentage change in the PPI for intermediate manufactured goods was 10,7% in November 2025, compared with 10,9% in October 2025. The index increased by 0,3% month-on-month. The main positive contributors to the annual rate were basic and fabricated metals (21,7% and contributing 10,9%) and sawmilling and wood (8,5% and contributing 0,9%). The main positive contributor to the monthly rate was basic and fabricated metals (1,0% and contributing 0,6 of a percentage point).
- The annual percentage change in the PPI for electricity and water was 15,3% in November 2025, compared with 16,1% in October 2025. The index decreased by 0,7% month-on-month. The contributors to the annual rate were electricity (15,9% and contributing 13,6%) and water (11,6% and contributing 1,6%). The contributor to the monthly rate was electricity (-0,8% and contributing -0,7%).
- The annual percentage change in the PPI for mining was 19,9% in November 2025, compared with 18,4% in October 2025. The index increased by 1,4% month-on-month. The positive contributors to the annual rate were non-ferrous metal ores (32,7% and contributing 16,1%) and gold and other metal ores (25,2% and contributing 7,1%). The positive contributors to the monthly rate were non-ferrous metal ores (2,5% and contributing 1,4%) and coal and gas (12,1% and contributing 1,4%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was -2,4% in November 2025, compared with -1,8% in October 2025. The index increased by 2,7% month-on-month. The main negative contributor to the annual rate was agriculture (-3,7% and contributing -3,2%). The main positive contributor to the monthly rate was agriculture (3,2% and contributing 2,7%).

4.3 Future contract prices

Table 3: Closing prices on Thursday, 15 January 2026

	15 January 2026	15 December 2025	% Change
RSA White Maize per ton (Jan. 2026 contract)	R3 564,00	R3 590,00	-0,72
RSA Yellow Maize per ton (Jan. 2026 contract)	R3 428,00	R3 545,00	-3,30
RSA Wheat per ton (Jan. 2026 contract)	R5 825,00	R5 850,00	-0,43
RSA Sunflower seed per ton (Jan. 2026 contract)	R11 710,00	R10 772,00	8,71
RSA Soya-beans per ton (Jan. 2026 contract)	R6 550,00	R6 835,00	-4,17
Exchange rate R/$	R16,35	R16,82	-2,79

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- December 2025 tractor sales of 494 units were 11% more than the 444 units sold in December 2024. Calendar year 2025 tractor sales of 7 668 units were almost 19% up on the 6 463 units sold in 2024. Seven combine harvesters were sold in December 2025, one more than the six units sold in December 2024. Calendar year 2025 combine harvester sales of 207 units were 3% up on the 201 units sold in 2024.
- Weather conditions, in general, are favourable, with summer crop production prospects looking good. Winter crop production too has been good. Farmers are cautiously optimistic about their summer crops, but will of course wait until they have harvested these before finalising their buying decisions.
- At this early stage, expectations for 2026 tractor sales are that they are likely to be between 5 and 10% lower than last year. Combine harvester sales are likely to be similar to those of last year.

Table 4: Agricultural machinery sales

Equipment class	Year-on-year		Percentage	Year-to-date		Percentage
	December		**Change**	**December**		**Change**
	2025	**2024**	**%**	**2025**	**2024**	**%**
Tractors	494	444	11,26	7 668	6 463	18,64
Combine harvesters	7	6	16,67	207	201	2,98

Source: SAAMA press release, January 2026

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

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