MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA FEBRUARY 2026

Issued: 6 March 2026

Directorate: Statistics and Economic Analysis

- **According to the latest Seasonal Climate Watch from South African Weather Service for the period march to July 2026, the El Niño-Southern Oscillation (ENSO) is currently still in a weak La Niña state.**
- **The commercial wheat crop for 2025 is 1,897 million tons, which is 1,7% less than the 1,930 million tons of the previous season (2024).**
- **The projected closing stocks of wheat for the 2025/26 marketing year are 471 114 tons, which includes imports of 1,800 million tons. It is also 27,6% less than the previous years' ending stocks.**
- **The expected commercial maize crop for 2026 is 16,126 million tons, which is 3,2% less than the 16,650 million tons of the previous season (2025).**
- **Projected closing stocks of maize for the current 2025/26 marketing year are 2,794 million tons, which is 327,4% more than the previous years' ending stocks.**
- **Projected closing stocks of maize for the coming 2026/27 marketing year are 3,742 million tons, which is 33,9% more than the previous years' ending stocks**
- **The projected closing stocks of sorghum for the current 2025/26 marketing year are 86 473 tons, which is 0,1% more than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the coming 2026/27 marketing year are 68 621 tons, which is 20,6% less than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2025/26 marketing year are 42 229 tons, which is 42,0% less than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the coming 2026/27 marketing year are 46 254 tons, which is 9,5% more than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the current 2025/26 marketing year are 337 176 tons, which is 139,6% more than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the coming 2026/27 marketing year are 370 301 tons, which is 9,8% more than the previous years' ending stocks.**
- **The annual percentage change in the CPI was lower at 3,5% in January 2026.**
- **The annual percentage change in the PPI for final manufactured goods was lower at 2,2% in January 2026.**
- **February 2026 tractor sales of 669 units were 5% more than the 636 units sold in February 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 March to July 2026, the El Niño-Southern Oscillation (ENSO) is currently still in a weak La Niña state. However, it is expected to return to a neutral state and potentially rapidly evolve into an El Nino state by end of the southern hemisphere winter, which may impact the next summer rainfall areas in South Africa. It is still too early to indicate confident impacts of this potential El Nino event; however, it is advised that potentially impacted users keep up to date with the ENSO predictions in the coming months.

During the autumn and early winter, it is only the southern and eastern coastal areas that receive significant rainfall. For these areas the south-eastern and eastern coastal areas are expected to receive above-normal rainfall, and the south-western parts below-normal rainfall.

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

1.2 Level of dams

Available information on the level of South Africa's dams on 2 March 2026 indicates that the country has approximately 96% of its full supply capacity (FSC) available, which is 9,0% more as compared to the corresponding period in 2025. The Northern Cape (33%), Free State (19%), Limpopo (8%), Gauteng (5%) and Mpumalanga (2%) all show increases in the full supply capacity as compared to 2025. However, the Western Cape (-16%), North West (-4%), KwaZulu-Natal (-4%) and Eastern Cape Province (-1%), show decreases 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, 2 March 2026

Province	Net FSC million cubic meters	**2/03/2026 (%)**	Last Year (2025) (%)	% Increase/Decrease 2026 vs. 2025
Eastern Cape	1 731	81	82	-1,0
Free State	15 665	103	84	19,0
Gauteng	128	101	96	5,0
Kindom of Lesotho	2 363	102	92	10,0
Kingdom of Eswatini	334	100	100	-
Kwazulu-Natal	4 910	90	94	-4,0
Limpopo	1 485	99	91	8,0
Mpumalanga	2 538	100	98	2,0
North West	866	97	101	-4,0
Northern Cape	150	95	62	33,0
Western Cape	1 918	51	67	-16,0
Total	32 088	**96**	**87**	9,0

Source: Department of Water and Sanitation

2. Grain production

2.1 Summer grain crops - 2026

The revised area planted and first production forecast for summer grains for the 2026 season was released by the Crop Estimates Committee (CEC) on 26 February 2026, and is as follows:

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

CROP	Area planted 2026 Ha (A)	1st forecast 2026 Tons (B)	Area planted 2025 Ha (C)	Final estimate 2025 Tons (D)	Change 2026 vs 2025 % (B) ÷ (d)
Commercial:					
White maize	**1 644 700**	**8 509 550**	1 599 700	8 450 000	0,70%
Yellow maize	**1 071 500**	**7 616 800**	997 000	8 200 000	-7,11%
Total Maize	**2 716 200**	**16 126 350**	2 596 700	16 650 000	-3,15%
Sunflower seed	**569 600**	**754 475**	555 700	700 000	7,78%
Soybeans	**1 212 500**	**2 661 425**	1 151 000	2 800 000	-4,95%
Groundnuts	**44 450**	**65 238**	48 125	63 350	2,98%
Sorghum	**41 500**	**131 888**	41 150	150 000	-12,08%
Dry beans	**40 400**	**78 594**	45 620	90 556	-13,21%
TOTAL	**4 624 650**	**19 817 969**	4 438 295	20 453 906	-3,11%

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

- The revised 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, and 1,57% or 42 000 ha more than the preliminary area estimate of 2 674 200 ha released in January 2026.
- The area estimate for **white maize** is 1 644 700 ha, which represents an increase of 2,81% or 45 000 ha compared to the 1 599 700 ha planted last season. The production forecast of white maize is 8 509 550 tons, which is 0,70% or 59 550 tons more than the 8 450 000 tons of last season. The yield for white maize is 5,17 t/ha.
- In the case of **yellow maize,** the area estimate is 1 071 500 ha, which is 7,47% or 74 500 ha more than the 997 000 ha planted last season. The yellow maize production forecast is 7 616 800 tons, which is 7,11% or 583 200 tons less than the 8 200 000 tons of last season. The yield for yellow maize is 7,11 t/ha.
- The revised area estimate for **sunflower seed** is 569 600 ha, which is 2,50% or 13 900 ha more than the 555 700 ha planted the previous season. The production forecast for sunflower seed is 754 475 tons, which is 7,78% or 54 475 tons more than the 700 000 tons of the previous season. The expected yield is 1,32 t/ha.
- I It is estimated that 1 212 500 ha have been planted to **soybeans**, which represents an increase of 5,34% or 61 500 ha compared to the 1 151 000 ha planted last season. The production forecast is 2 661 425 tons, which is 4,95% or 138 575 tons less than the 2 800 000 tons of the previous season. The expected yield is 2,19 t/ha.
- For **groundnuts**, the area estimate is 44 450 ha, which is 7,64% or 3 675 ha less than the 48 125 ha planted for the previous season. The expected crop is 65 238 tons – which is 2,98% or 1 888 tons more than the 63 350 tons of last season. The expected yield is 1,47 t/ha.
- The area estimate for **sorghum** increased slightly by 0,85% or 350 ha, from 41 150 ha to 41 500 ha against the previous season. The production forecast for sorghum is 131 888 tons, which is 12,08% or 18 113 tons less than the 150 000 tons of the previous season. The expected yield is 3,18 t/ha.
- For **dry beans**, the area estimate is 40 400 ha, which is 11,44% or 5 220 ha less than the 45 620 ha planted for the previous season. The production forecast is 78 594 tons, which is 13,21% or 11 962 tons less than the 90 556 tons of the previous season. The expected yield is 1,95 t/ha.

The revised area planted and second production figures will be released by the Crop Estimates Committee on 26 March 2026.

2.2 Winter cereal crops – 2025

The CEC also released area planted estimate and final production estimate for winter cereals for 2025 on

26 February 2026, and is as follows:.

Table 3: Winter cereals: Area planted estimate and final production estimate - 2025 season

CROP	**Area planted 2025** **Ha** **(A)**	**Final estimate 2025** **Tons** **(B)**	Area planted 2024 Ha (C)	Final crop 2024 Tons (D)	Change % (B) ÷ (D)
Commercial[1]:					
Wheat	**517 300**	**1 897 220**	505 300	1 930 000	-1,70%
Barley	**96 950**	**346 430**	100 700	372 250	-6,94%
Canola	**174 515**	**309 035**	165 750	290 400	6,42%
Oats	**35 520**	**45 143**	31 000	43 400	4,02%
Sweet lupines	**21 000**	**17 850**	16 000	19 200	-7,03%
Total winter	**845 285**	**2 615 678**	818 750	2 655 250	-1,49%

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

- The final production estimate of **wheat** for 2025 is 1 897 220 tons, which is 1,70% or 32 780 tons less than the previous seasons' crop of 1 930 000 tons, whilst the expected yield is 3,67 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 final production estimate of **barley** for 2025 is 346 430 tons, which is 6,94% or 25 820 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 3,57 t/ha.
- The **canola crop** for 2025 is 309 035 tons, which is 6,42% or 18 635 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 1,77 t/ha.
- The crop for **oats** for the 2025 season is 45 143 tons, which is 4,02% or 1 743 tons more than the previous seasons' crop of 43 400 tons. The area planted is 35 520 ha and the expected yield is 1,27 t/ha.
- In the case of **sweet lupines,** the final production estimate is 17 850 tons, representing a decrease of 7,03% or 1350 tons compared to the 19 200 tons of 2024. The area estimate of sweet lupines is 21 000 ha, with an expected yield of 0,85 t/ha.

Please note that the intentions to plant winter cereals for 2026 will be released on 23 April 2026.

2.3 Non-commercial maize - 2026

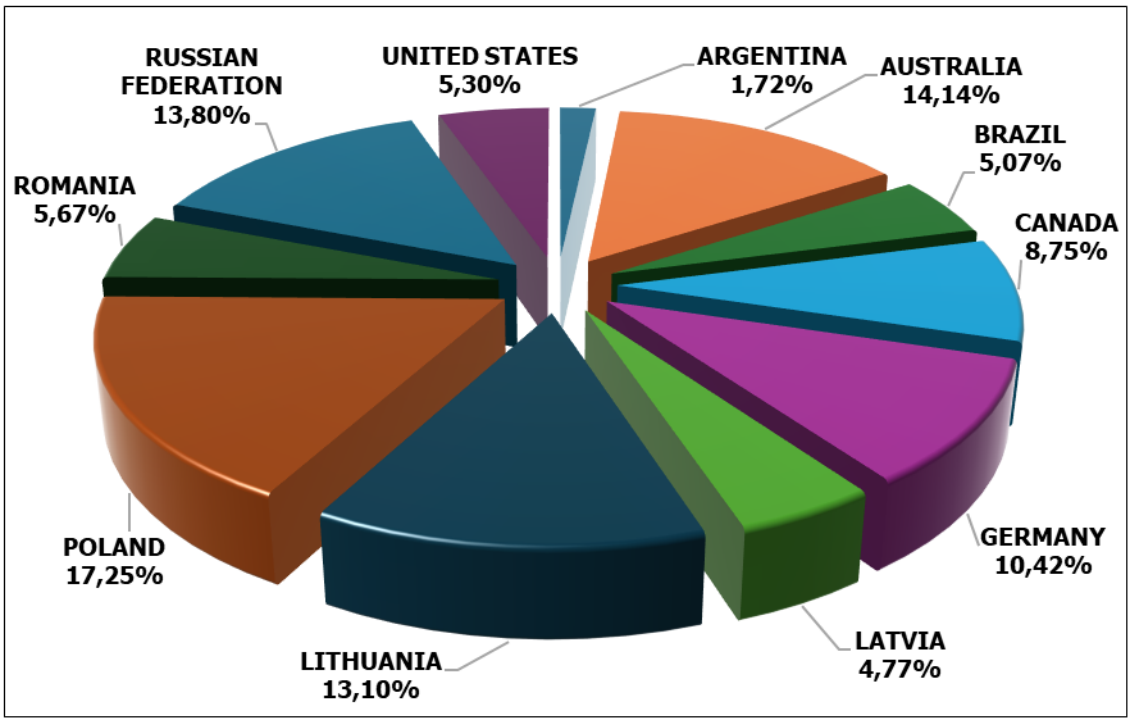
Please note that the preliminary area planted and production estimate of the non-commercial maize sector for the 2026 season will be published on 23 April 2026.

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 FEB26 Annexure A.

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

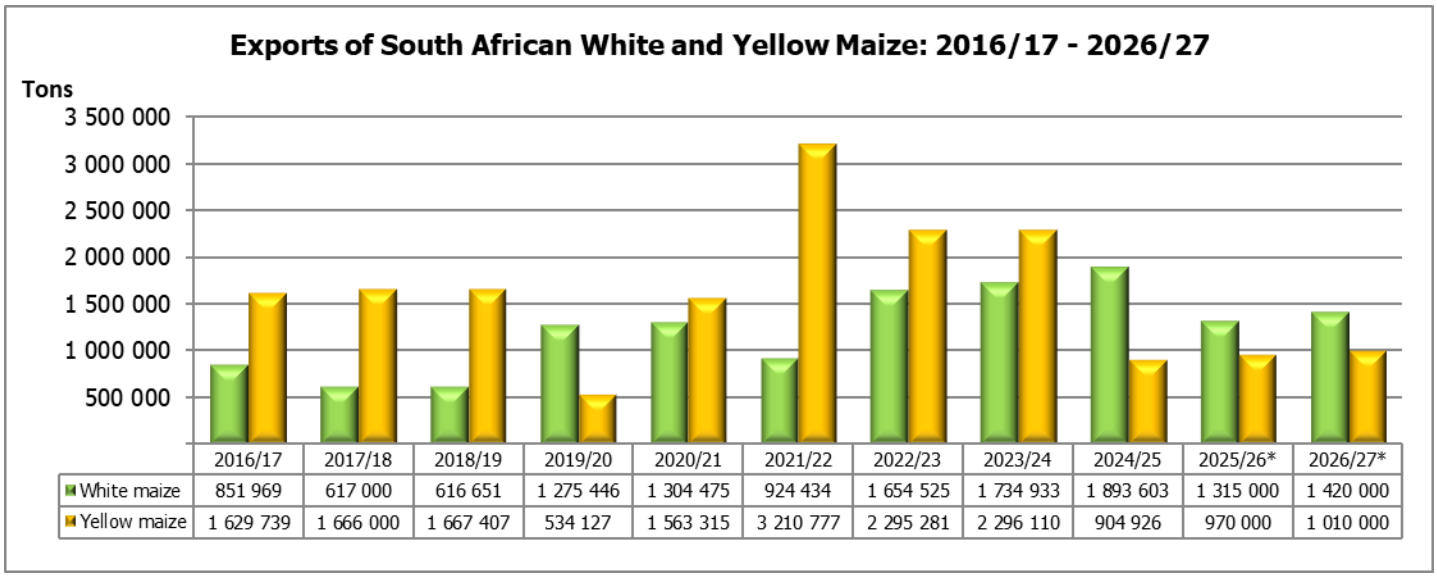
Graph 1: Major countries of wheat imports to South Africa: 2025/26 marketing year



- The progressive wheat imports (human consumption) for the 2025/26 marketing year (27 September 2025 to 27 February 2026) amount to 626 888 tons, with 17,25% or 108 158 tons from Poland, followed by 14,14% or 88 628 tons from Australia, 13,80% or 86 518 tons from Russian Federation, 13,10% or 82 132 tons from Lithuania, 10,42% or 65 348 tons from Germany, 8,75% or 54 859 tons from Canada, 5,67% or 35 573 tons from Romania, 5,30% or 33 244 tons from the United States, 5,07% or 31 775 tons from Brazil, 4,77% or 29 883 tons from Latvia and only 1,72% or 10 770 tons from Argentina. The exports of wheat (human consumption) for the above-mentioned period amount to 18 702 tons, of which 39,73% or 7 430 tons went to Botswana, 36,46% or 6 819 tons went to Lesotho, 16,78% or 3 139 tons went to Zimbabwe, 5,48% or 1 025 tons went to Namibia and only 1,55% or 289 tons went to Zambia.

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	1 315 000	1 420 000
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	970 000	1 010 000

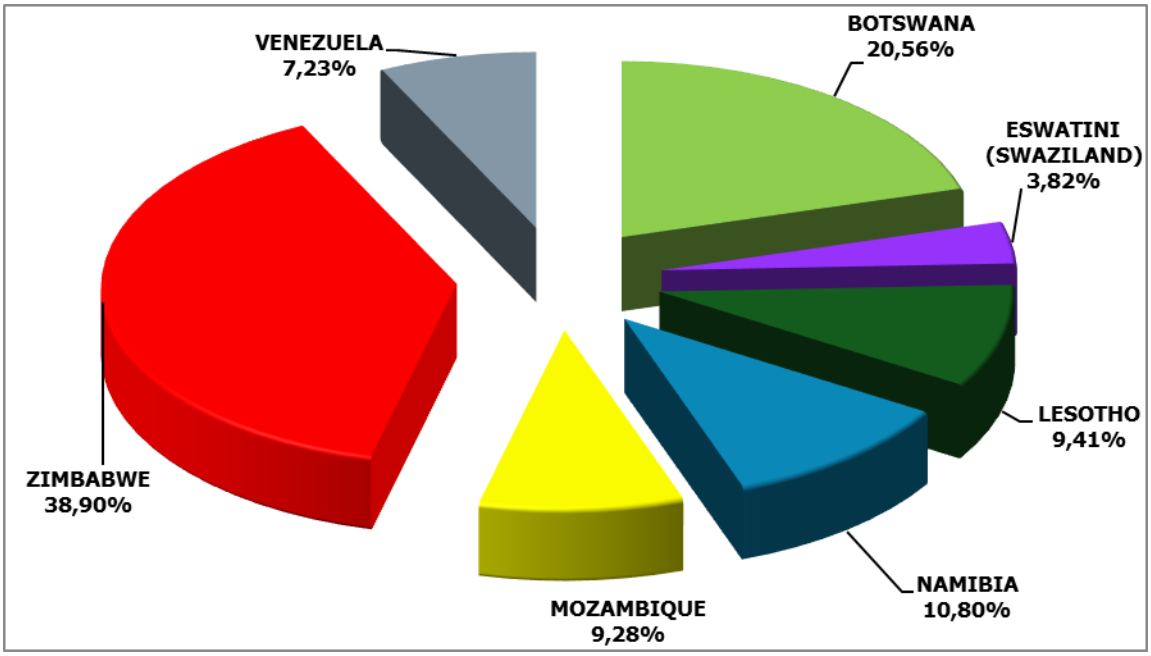
*Projection

- 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 970 000 tons, which represents an increase of 7,19% or 65 074 tons compared to the 904 926 tons of the previous marketing year.

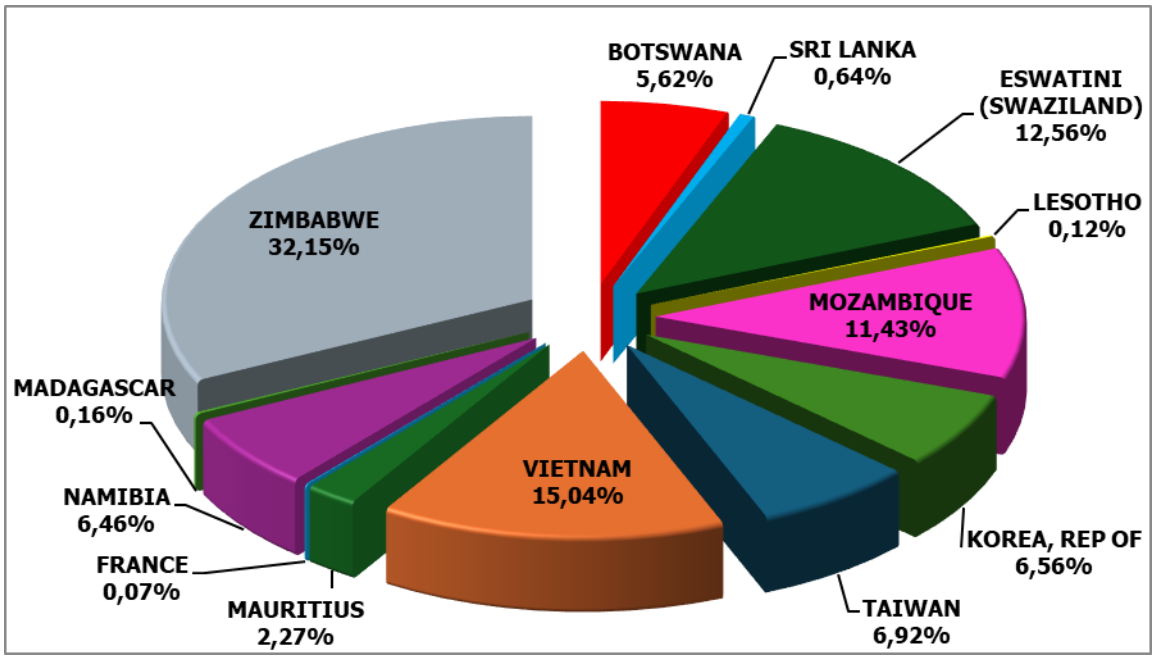
- The exports of white maize for the 2026/27 marketing year are projected at 1,420 million tons, which represents a decrease of 7,98% or 105 000 tons compared to the 1,315 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 1,010 million tons, which represents an increase of 4,12% or 40 000 tons compared to the 970 000 tons of the previous marketing year.

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



- From 26 April 2025 to 27 February 2026, progressive white maize exports for the 2025/26 marketing year amount to 913 336 tons, with the main destinations being Zimbabwe (38,90% or 355 330 tons), followed by Botswana (20,56% or 187 777 tons), Namibia (10,80% or 98 621 tons), Lesotho (9,41% or 85 937 tons), Mozambique (9,28% or 84 741 tons), Venezuela (7,23% or 66 001 tons) and Eswathini (Swaziland) (3,82% or 34 929 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 27 February 2026, progressive yellow maize exports for the 2025/26 marketing year amount to 725 706 tons, with the main destinations being, Zimbabwe (32,15% or 233 324 tons), followed by Vietnam (15,04% or 109 120 tons), Eswathini (Swaziland) (12,56% or 91 151 tons), Mozambique (11,43% or 82 928 tons), Taiwan (6,92% or 50 255 tons), Republic of Korea (6,56% or 47 633 tons), Namibia (6,46% or 46 890 tons), Botswana (5,62% or 40 771 tons), Mauritius (2,27% or 16 504 tons), Sri Lanka (0,64% or 4 649 tons), Madagascar (0,16% or 1 153 tons), Lesotho (0,12% or 848 tons) and France (0,07% or 480 tons). The imports of yellow maize for the mentioned period 110 448 tons, 100% from Argentina.

4. Market information

4.1 Consumer Price Index (CPI)

- Annual consumer price inflation was 3,5% in January 2026, down from 3,6% in December 2025. The CPI increased by 0,2% month-on-month in January 2026.
- The main contributors to the 3,5% annual inflation rate were:
  - Housing and utilities (4,8% and contributing 1,2%);
  - Food and non-alcoholic beverages (4,4% and contributing 0,8%); and
  - Insurance and financial services (6,8% and contributing 0,7%).
- In January 2026, the annual inflation rate for:
  - Goods were 2,7%, down from 3,0% in December 2025; and
  - Services were 4,2%, unchanged from December 2025.

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 2,2% in January 2026, compared with 2,9% in December 2025. The producer price index (PPI) decreased by 0,2% month-on-month in January 2026.
- The main positive contributors to the headline PPI annual inflation rate were food products, beverages and tobacco products (2,4% and contributing 0,7%) and furniture and other manufacturing (12,2% and contributing 0,5%). The main negative contributor to the monthly rate was coke, petroleum, chemical, rubber and plastic products (-2,3% and contributing -0,5%).
- The annual percentage change in the PPI for intermediate manufactured goods was 10,5% in January 2026, compared with 10,1% in December 2025. The index increased by 2,6% month-on-month. The main positive contributors to the annual rate were basic and fabricated metals (25,2% and contributing 11,8%) and sawmilling and wood (8,5% and contributing 0,8%). The main positive contributor to the monthly rate was basic and fabricated metals (5,9% and contributing 3,0%).
- The annual percentage change in the PPI for electricity and water was 16,7% in January 2026, compared with 16,9% in December 2025. The index increased by 0,3% month-on-month. The contributors to the annual rate were electricity (17,5% and contributing 14,4%) and water (11,6% and contributing 2,0%). The contributor to the monthly rate was electricity (0,4% and contributing 0,3%).
- The annual percentage change in the PPI for mining was 28,4% in January 2026, compared with 25,7% in December 2025. The index increased by 5,1% month-on-month. The positive contributors to the annual rate were non-ferrous metal ores (51,3% and contributing 22,3%) and gold and other metal ores (23,9% and contributing 6,6%). The positive contributors to the monthly rate were non-ferrous metal ores (9,2% and contributing 4,5%) and gold and other metal ores (3,2% and contributing 0,9%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was -5,8% in January 2026, compared with -5,0% in December 2025. The index decreased by 2,0% month-on-month. The negative contributor to the annual rate was agriculture (-7,7% and contributing -6,7%). The negative contributor to the monthly rate was agriculture (-2,6% and contributing -2,2%).

4.3 Future contract prices

Table 4: Closing prices on Thursday, 5 March 2026

	5 March 2026	5 February 2026	% Change
RSA White Maize per ton (Mar. 2026 contract)	R3 151,00	R3 566,00	-11,64
RSA Yellow Maize per ton (Mar. 2026 contract)	R3 280,00	R3 449,00	-4,90
RSA Wheat per ton (Mar. 2026 contract)	R5 902,00	R5 645,00	4,55
RSA Sunflower seed per ton (Mar. 2026 contract)	R9 267,00	R9 100,00	1,84
RSA Soya-beans per ton (Mar. 2026 contract)	R6 832,00	R6 753,00	1,17
Exchange rate R/$	R16,47	R16,16	1,92

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- February 2026 tractor sales of 669 units were 5% more than the 636 units sold in February 2025. On a year-to-date basis tractor sales are now approximately 8% up on last year. Thirty-one combine harvesters were sold in February 2026, twelve more than the 19 units sold in February 2025. On a year-to-date basis, combine harvester sales are now 50% up on last year.
- Market sentiment continues to be positive. Although commodity prices have softened, summer crop production looks as though it will be good. Farmers are, in some cases, holding back on making buying decisions until harvest-time. They will then be able to see what their crop production is.
- 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
	February		**Change**	**February**		**Change**
	2026	**2025**	**%**	**2026**	**2025**	**%**
Tractors	669	636	5,19%	1 186	1 093	8,51%
Combine harvesters	31	19	63,13%	36	24	50,00%

Source: SAAMA press release, March 2026

PLEASE NOTE: The Food Security Bulletin for March 2026 will be released on **8 April 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