MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA JANUARY 2026

Issued: 5 February 2026

Directorate: Statistics and Economic Analysis

- **During January 2026, significant rainfall events were limited to the eastern half of the country.**
- **The expected commercial wheat crop for 2025 is 1,932 million tons, which is 0,1% 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 455 014 tons, which includes imports of 1,750 million tons. It is also 30,1% 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 2,533 million tons, which is 287,5% more than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the current 2025/26 marketing year are 82 312 tons, which is 4,7% less than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2025/26 marketing year are 44 989 tons, which is 38,2% less than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the current 2025/26 marketing year are 368 259 tons, which is 161,7% more than the previous years' ending stocks.**
- **The annual percentage change in the CPI was higher at 3,6% in December 2025.**
- **The annual percentage change in the PPI for final manufactured goods was unchanged at 2,9% in December 2025.**
- **December 2025 tractor sales of 494 units were 11% more than the 444 units sold in December 2024.**

agriculture

Department:
Agriculture
REPUBLIC OF SOUTH AFRICA

Enquiries: Marda Scheepers or Queen Makgoka

Directorate: Statistics and Economic Analysis

Tel: +27 12 319 8033/8164

Email:MardaS@nda.gov.za or QueenMak@nda.gov.za

Contents

1. Weather conditions

1.1 Rainfall for January 2026

During January 2026, significant rainfall events were limited to the eastern half of the country (**Figure 1**). Comparing rainfall totals to the long-term average for January 2026, rainfall received was below-normal over most of the country apart from the extreme north-eastern areas where above-normal rainfall was received (**Figure 2**). (Source: Directorate: Climate Change and Disaster Management of Department: Agriculture).

Figure 1: Rainfall (mm) for January 2026

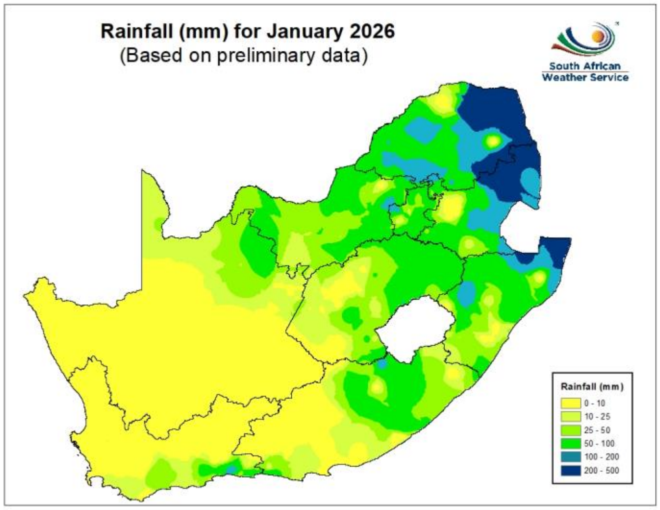
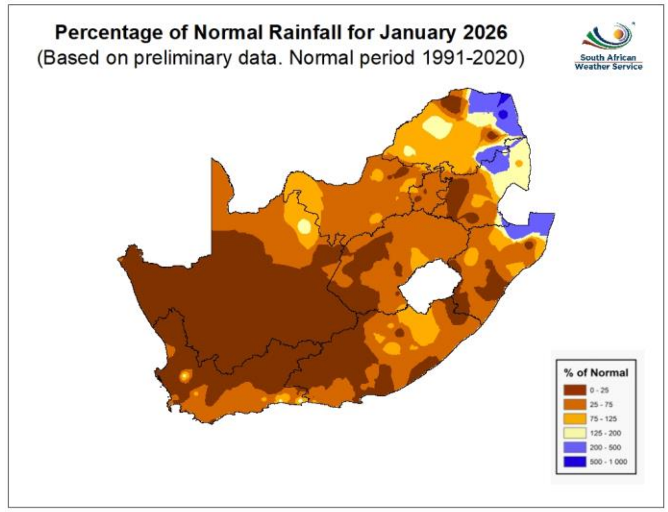


Figure 2: Percentage rainfall for January 2026



1.2 Level of dams

Available information on the level of South Africa's dams on 2 February 2026 indicates that the country has approximately 93% of its full supply capacity (FSC) available, which is 12,0% more as compared to the corresponding period in 2025. The Northern Cape (33%), North West (28%), Free State (21%), Limpopo (15%), Gauteng (13%), Mpumalanga (5%) and KwaZulu-Natal (3%) all show increases in the full supply capacity as compared to 2025. However, the Western Cape (-22%) and Eastern Cape Province (-%), 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 February 2026

Province	Net FSC million cubic meters	**2/02/2026 (%)**	Last Year (2025) (%)	% Increase/Decrease 2026 vs. 2025
Eastern Cape	1 728	73	81	-8,0
Free State	15 657	97	76	21,0
Gauteng	128	102	89	13,0
Kindom of Lesotho	2 363	99	87	12,0
Kingdom of Eswatini	334	100	100	-
Kwazulu-Natal	4 910	91	88	3,0
Limpopo	1 485	99	84	15,0
Mpumalanga	2 538	100	95	5,0
North West	866	98	70	28,0
Northern Cape	146	94	61	33,0
Western Cape	1 866	53	75	-22,0
Total	32 072	**93**	**81**	12,0

Source: Department of Water and Sanitation

2. Grain production

2.1 Summer grain crops - 2026

The preliminary area planted estimate for summer grains for the 2026 season was released by the Crop Estimates Committee (CEC) on 27 January 2026, and is as follows:

Table 2: Commercial summer grains: Preliminary area planted estimate - 2026 season

CROP	Prel. area planted 2026 Ha (A)	**Intentions 1) 2026 Tons (B)**	Area planted 2025 Ha (C)	Final estimate 2) 2025 Tons (D)	Change 2026 vs 2025 % (A) ÷ (C)
Commercial:					
White maize	**1 644 200**	1 614 700	1 599 700	8 378 250	2,78%
Yellow maize	**1 030 000**	1 051 000	997 000	8 057 400	3,31%
Total Maize	**2 674 200**	2 665 700	2 596 700	16 435 650	2,98%
Sunflower seed	**560 800**	531 100	555 700	708 300	0,92%
Soybeans	**1 185 000**	1 179 200	1 151 000	2 771 225	2,95%
Groundnuts	**43 650**	42 240	48 125	62 474	-9,30%
Sorghum	**39 000**	39 250	41 150	146 605	-5,22%
Dry beans	**36 400**	36 420	45 620	90 556	-20,21%
TOTAL	**4 539 050**	4 493 910	4 438 295	20 214 810	2,27%

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

1) As mid October 2025

2) 27 November 2025

- The preliminary area estimate for **maize** is 2,674 000 million ha, which is 2,98% or 77 500 ha more than the 2,597 million ha planted for the previous season, and also 0,32% or 8 500 ha more than the intentions to plant figure of 2,666 million ha released in October 2025.
- The preliminary area estimate for **white maize** is 1,644 million ha, which represents an increase of 2,78% or 44 500 ha compared to the 1,600 million ha planted last season. In the case of **yellow maize**, the area estimate is 1,030 million ha, which is 3,31% or 33 000 ha more than the 997 000 ha planted last season.
- The preliminary area estimate for **sunflower seed** is 560 800 ha, which is 0,92% or 5 100 ha more than the 555 700 ha planted the previous season.
- It is estimated that 1,185 million ha have been planted to **soybeans**, which represents an increase of 2,95% or 34 000 ha compared to the 1,151 million ha planted last season.
- For **groundnuts**, the area estimate is 43 650 ha, which is 9,30% or 4 475 ha less than the 48 125 ha planted for the previous season.
- The area estimate for **sorghum** decreased by 5,22% or 2 150 ha, from 41 150 ha to 39 000 ha against the previous season.
- For **dry beans**, the area estimate is 36 400 ha, which is 20,21% or 9 220 ha less than the 45 620 ha planted for the previous season.

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

2.2 Winter cereal crops – 2025

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

27 January 2026.

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

CROP	**Area planted 2025** **Ha** **(A)**	**6th forecast 2025** **Tons** **(B)**	Area planted 2024 Ha (C)	Final crop 2024 Tons (D)	Change % (B) ÷ (D)
Commercial[1]:					
Wheat	**517 300**	**1 932 120**	505 300	1 930 000	0,11%
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**	**45 143**	31 000	43 400	4,02%
Sweet lupines	**21 000**	**18 900**	16 000	19 200	-1,56%
Total winter	**845 285**	**2 658 743**	818 750	2 655 250	0,13%

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 1 932 120 tons, which is 0,11% or 2 120 tons more than the previous seasons' crop of 1 930 000 tons, whilst the expected yield is 3,74 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 45 143 tons and the area planted is 35 520 ha. The expected yield is 1,27 t/ha.
- In the case of **sweet lupines,** the production forecast is 18 900 tons. The area estimate of sweet lupines is 21 000 ha, with an expected yield of 0,90 t/ha.

Please note that the final production estimate for winter cereals for 2025 will be released on 26 February 2026.

2.3 Non-commercial maize - 2026

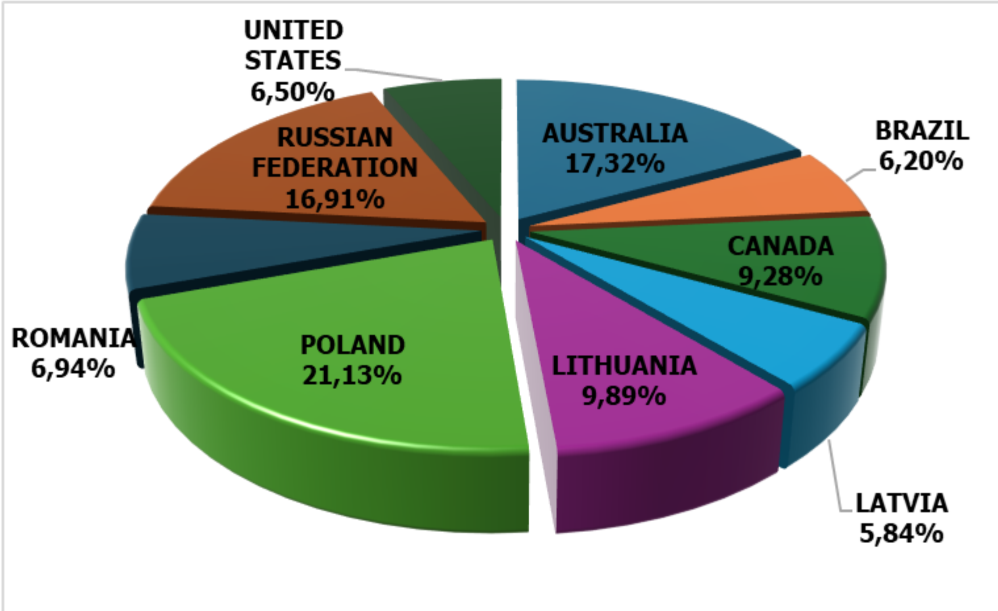
Please note that the preliminary area planted and production estimate of the non-commercial maize sector for the 2026 season will be published on 23 April 2026.

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 JAN26 Annexure A.

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

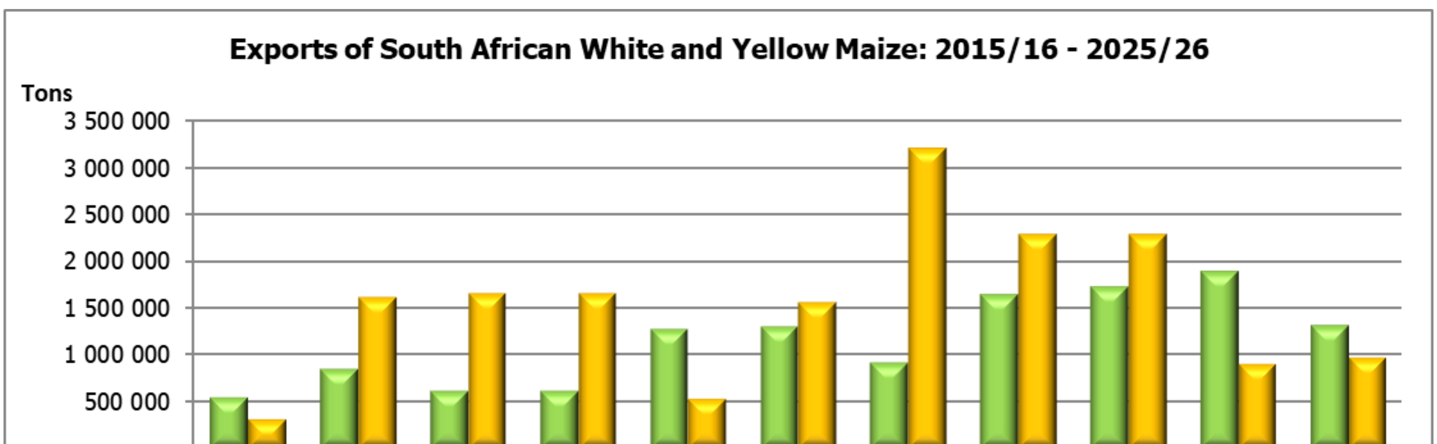
Graph 1: Major countries of wheat imports to South Africa: 2025/26 marketing year



- The progressive wheat imports (human consumption) for the 2025/26 marketing year (27 September 2025 to 30 January 2026) amount to 511 765 tons, with 21,13% or 108 158 tons from Poland, followed by 17,32% or 88 628 tons from Australia, 16,91% or 86 518 tons from Russian Federation, 9,89% or 50 607 tons from Lithuania, 9,28% or 47 508 tons from Canada, 6,94% or 35 509 tons from Romania, 6,50% or 33 244 tons from the United States, 6,20% or 31 710 tons from Brazil and 5,84% or 29 883 tons from Latvia. The exports of wheat (human consumption) for the above-mentioned period amount to 10 275 tons, of which 36,38% or 3 738 tons went to Lesotho, 33,71% or 3 464 tons went to Botswana, 26,36% or 2 708 tons went to Zimbabwe, 2,81% or 289 tons went to Zambia and only 0,74% or 76 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

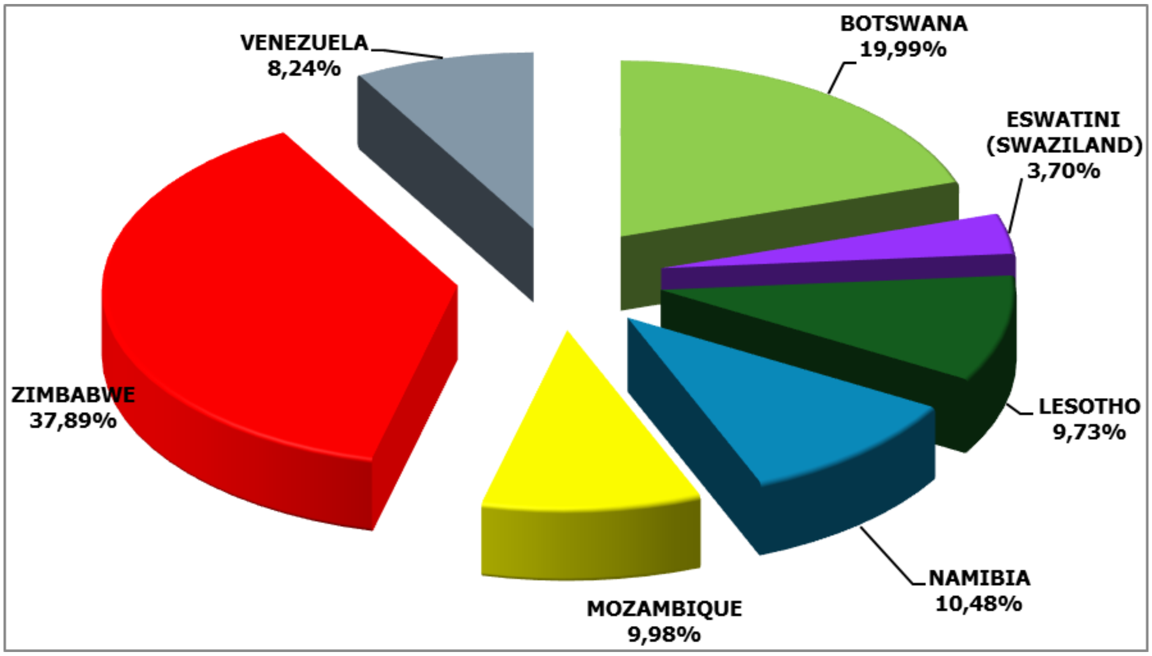


	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26*
White maize	557 063	851 969	617 000	616 651	1 275 446	1 304 475	924 434	1 654 525	1 734 933	1 893 603	1 325 000
Yellow maize	322 748	1 629 739	1 666 000	1 667 407	534 127	1 563 315	3 210 777	2 295 281	2 296 110	904 926	973 000

*Projection

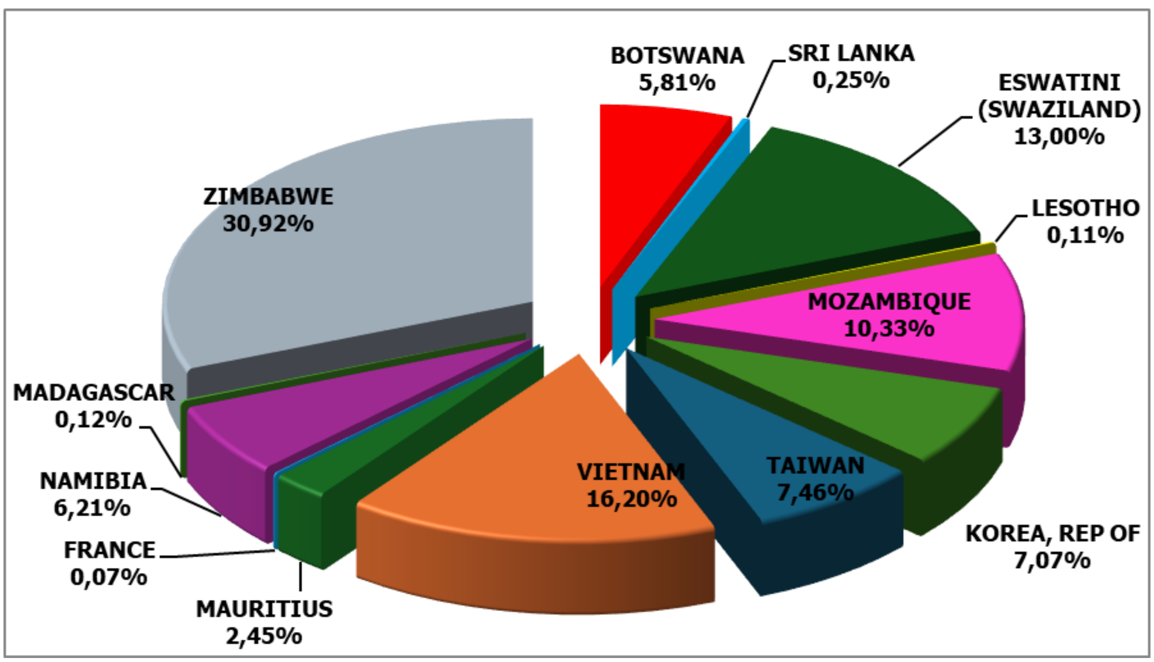
- The exports of white maize for the 2025/26 marketing year are projected at 1,325 million tons, which represents a decrease of 30,03% or 568 603 tons compared to the 1,894 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 973 000 tons, which represents an increase of 7,52% or 68 074 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 30 January 2026, progressive white maize exports for the 2025/26 marketing year amount to 800 519 tons, with the main destinations being Zimbabwe (37,89% or 303 279 tons), followed by Botswana (19,99% or 160 057 tons), Namibia (10,48% or 83 877 tons), Mozambique (9,98% or 79 870 tons), Lesotho (9,73% or 77 855 tons), Venezuela (8,24% or 66 001 tons) and Eswathini (Swaziland) (3,70% or 29 580 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 30 January 2026, progressive yellow maize exports for the 2025/26 marketing year amount to 673 739 tons, with the main destinations being, Zimbabwe (30,92% or 208 309 tons), followed by Vietnam (16,20% or 109 120 tons), Eswathini (Swaziland) (13,00% or 87 584 tons), Mozambique (10,33% or 69 622 tons), Taiwan (7,46% or 50 255 tons), Republic of Korea (7,07% or 47 633 tons), Namibia (6,21% or 41 840 tons), Botswana (5,81% or 39 140 tons), Mauritius (2,45% or 16 504 tons), Sri Lanka (0,25% or 1 712 tons), Madagascar (0,12% or 796 tons), Lesotho (0,11% or 744 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 3,6% in December 2025, up from 3,5% in November 2025. The CPI increased by 0,2% month-on-month in December 2025.
- The main contributors to the 3,6% annual inflation rate were:
  - Housing and utilities (4,9% and contributing 1,2%);
  - Food and non-alcoholic beverages (4,4% and contributing 0,8%); and
  - Insurance and financial services (7,0% and contributing 0,7%)
- In December 2025, the annual inflation rate for:
  - Goods were 3,0%, up from 2,9% in November 2025; and
  - Services were 4,2%, up from 4,1% in November 2025.

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 2,9% in December 2025, unchanged from November 2025. The producer price index (PPI) increased by 0,2% month-on-month in December 2025.
- The main positive contributors to the headline PPI annual inflation rate were food products, beverages and tobacco products (2,9% and contributing 0,9%) and furniture and other manufacturing (11,9% and contributing 0,5%). The main positive contributor to the monthly rate was coke, petroleum, chemical, rubber and plastic products (0,7% and contributing 0,2%).
- The annual percentage change in the PPI for intermediate manufactured goods was 10,1% in December 2025, compared with 10,7% in November 2025. The index remained unchanged month-on-month. The main positive contributors to the annual rate were basic and fabricated metals (22,1% and contributing 11,1%) and sawmilling and wood (8,2% and contributing 0,9%).
- The annual percentage change in the PPI for electricity and water was 16,9% in December 2025, compared with 15,3% in November 2025. The index increased by 0,2% month-on-month. The contributors to the annual rate were electricity (17,7% and contributing 15,2%) and water (11,6% and contributing 1,7%). The main contributor to the monthly rate was electricity (0,2% and contributing 0,1%).
- The annual percentage change in the PPI for mining was 25,7% in December 2025, compared with 19,9% in November 2025. The index increased by 2,6% month-on-month. The positive contributors to the annual rate were non-ferrous metal ores (40,3% and contributing 19,8%) and gold and other metal ores (25,5% and contributing 7,5%). The main positive contributors to the monthly rate were non-ferrous metal ores (3,5% and contributing 1,9%) and gold and other metal ores (1,8% and contributing 0,5%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was -5,0% in December 2025, compared with -2,4% in November 2025. The index decreased by 3,0% month-on-month. The main negative contributor to the annual rate was agriculture (-6,6% and contributing -5,8%). The main negative contributor to the monthly rate was agriculture (-3,4% and contributing -3,0%).

4.3 Future contract prices

Table 4: Closing prices on Thursday, 5 February 2026

	5 February 2026	5 January 2026	% Change
RSA White Maize per ton (Feb. 2026 contract)	R3 541,00	R3 464,00	2,22
RSA Yellow Maize per ton (Feb. 2026 contract)	R3 408,00	R3 409,00	-0,03
RSA Wheat per ton (Mar. 2026 contract)	R5 645,00	R5 948,00	-5,09
RSA Sunflower seed per ton (Mar. 2026 contract)	R9 100,00	R9 799,00	-7,13
RSA Soya-beans per ton (Mar. 2026 contract)	R6 753,00	R6 601,00	2,30
Exchange rate R/$	R16,16	R16,47	-1,88

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 5: Agricultural machinery sales

Equipment class	Year-on-year December		Percentage Change %	Year-to-date December		Percentage 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 February 2026 will be released on **6 March 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