MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA JULY 2025

Issued: 6 August 2025

Directorate: Statistics and Economic Analysis

- **According to the latest Seasonal Climate Watch of the South African Weather Service for the period August to December 2025, the El Niño-Southern Oscillation (ENSO) is firmly in 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 624 138 tons, which includes imports of 1,740 million tons. It is also 16,8% less than the previous years' ending stocks.**
- **The expected commercial maize crop for 2025 is 15,031 million tons, which is 17,0% 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 1,847 million tons, which is 182,4% more than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the current 2025/26 marketing year are 79 687 tons, which is 7,8% less than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2025/26 marketing year are 72 579 tons, which is 0,3% less than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the current 2025/26 marketing year are 437 979 tons, which is 211,3% more than the previous years' ending stocks.**
- **The annual percentage change in the CPI was higher at 3,0% in June 2025.**
- **The annual percentage change in the PPI for final manufactured goods was higher at 0,6% in June 2025.**
- **June 2025 tractor sales of 636 units were almost 31% more than the 487 units sold in June 2024.**

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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 August to December 2025, the El Niño-Southern Oscillation (ENSO) is firmly in 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.

With the start of the spring and early summer seasons, the eastern parts of the country normally start receiving significant rainfall. During early- and mid-spring the eastern and south-eastern areas of the country are expected to receive above-normal rainfall with most other areas expected to be below-normal. During the late-spring season, however, most areas of the country are expected to receive below-normal rainfall.

Minimum and maximum temperatures are largely expected to be above-normal for the most parts during the spring seasons.

1.2 Level of dams

Available information on the level of South Africa's dams on 4 August 2025 indicates that the country has approximately 97% of its full supply capacity (FSC) available, which is 13,0% more as compared to the corresponding period in 2024. The North West Province (29%), Free State (19%), Northern Cape (14%), Gauteng (11%), KwaZulu-Natal (9%), Limpopo (8%) and Mpumalanga (7%), all show increases in the full supply capacity as compared to 2024. However, the Eastern Cape Province remained unchanged, while the Western Cape Province (-13%) 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, 4 August 2025

Province	Net FSC million cubic meters	**04/08/2025 (%)**	Last Year (2024) (%)	% Increase/Decrease 2025 vs. 2024
Kingdom of Eswatini	334	97	94	3,0
Eastern Cape	1 728	82	82	-
Free State	15 657	101	82	19,0
Gauteng	128	98	87	11,0
KwaZulu-Natal	4 910	97	88	9,0
Kingdom of Lesotho	2 363	95	83	12,0
Limpopo	1 485	86	78	8,0
Mpumalanga	2 538	98	91	7,0
Northern Cape	146	96	82	14,0
North West	866	101	72	29,0
Western Cape	1 866	79	92	-13,0
Total	32 021	97	84	13,0

Source: Department of Water and Sanitation

2. Grain production

2.1 Summer grain crops - 2025

The area planted and sixth production forecast for summer grains for the 2025 season was released by the Crop Estimates Committee (CEC) on 29 July 2025, and is as follows:

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

CROP	**Area planted 2025 Ha (A)**	6th 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**	**7 735 900**	1 554 750	6 055 000	22,76%
Yellow maize	**997 000**	**7 295 275**	1 081 500	6 795 000	7,36%
Total Maize	**2 596 700**	**15 031 175**	2 636 250	12 850 000	16,97%
Sunflower seed	**555 700**	**708 300**	529 000	632 000	12,07%
Soybeans	**1 151 000**	**2 722 575**	1 150 500	1 848 000	47,33%
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**	**74 299**	39 550	50 495	47,14%
TOTAL	**4 438 295**	**18 735 708**	4 438 600	15 530 495	20,64%

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 15 031 175 tons, which is 16,97% or 2 181 175 tons more than the 12 850 000 tons of the previous season (2024). The yield for maize is 5,79 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 7 735 900 tons, which is 27,76% or 1 680 900 tons more than the 6 055 000 tons of last season. The yield for white maize is 4,84 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 7 295 275 tons, which is 7,36% or 500 275 tons more than the 6 795 000 tons of last season. The yield for yellow maize is 7,32 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 2 722 575 tons, which is 47,33% or 874 575 tons more than the 1 848 000 tons of the previous season. The expected yield is 2,37 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 74 299 tons, which is 47,14% or 23 804 tons more than the 50 495 tons of the previous season. The expected yield is 1,63 t/ha.

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

2.2 Winter cereal crops – 2025

The CEC also released preliminary area estimate for winter cereals for 2025 on 29 July 2025.

Table 3: Winter cereals: Preliminary area planted estimate - 2025 season

CROP	**Area planted 2025 Ha (A)**	Intentions* 2025 Ha (B)	Area planted 2024 Ha (C)	Final crop 202 Tons (D)	Change % (A) ÷ (C)
Commercial[1]:					
Wheat	**512 500**	513 200	505 300	1 930 000	1,4%
Barley	**95 700**	93 050	100 700	372 250	-5,0%
Canola	**164 900**	166 500	165 750	290 400	-0,5%
Oats	**33 520**	34 520	31 000	43 400	8,1%
Sweet lupines	**17 500**	20 700	16 000	19 200	9,4%
Total winter	**824 120**	827 970	818 750	2 655 250	0,7%

* Based on conditions at the middle of April 2025

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

- The preliminary area estimate for **wheat** is 512 500 ha, which is 1,42% or 7 200 ha more than the 505 300 ha planted for the previous season.
- The preliminary area estimate for **barley** is 95 700 ha, which is 4,97% or 5 000 ha less than the 100 700 ha of last season.
- The area planted to **canola** is 164 900 ha, which is 0,51% or 850 ha less than the 165 750 ha planted for the previous season.
- The preliminary area estimate for **oats** for the 2025 season is 33 520 ha and for **sweet lupines** 17 500 ha.

Please note that the revised area planted estimate and first production forecast for winter cereals for 2025 will be released on 27 August 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

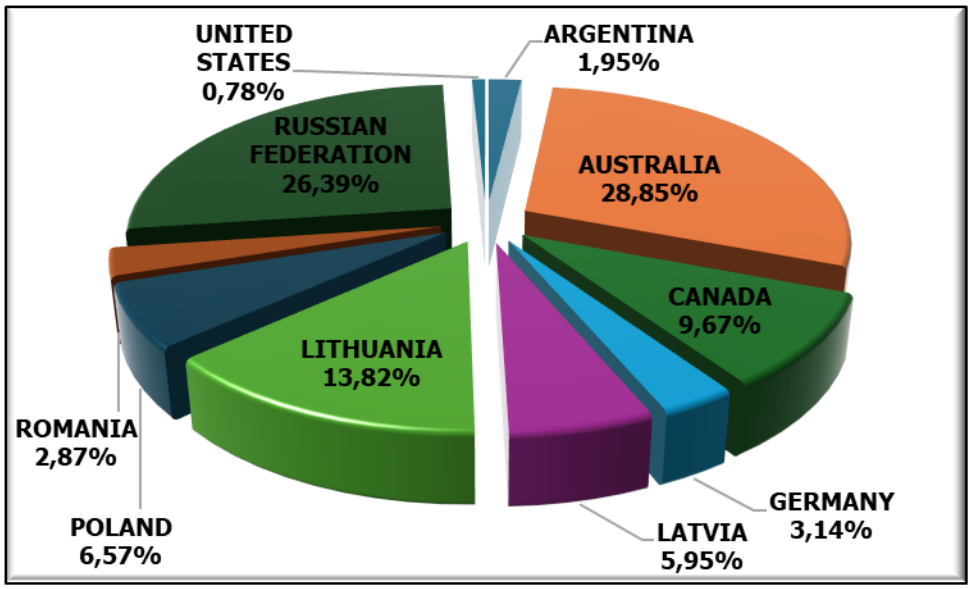
- The area planted to maize in the non-commercial agricultural sector is estimated at 358 000 ha, which represents an increase of 3,17%, compared to the 347 000 ha of the previous season. The expected maize crop for this sector is 621 500 tons, which is 8,09% more than the 575 000 tons of last season. 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 JULY25 Annexure A.

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

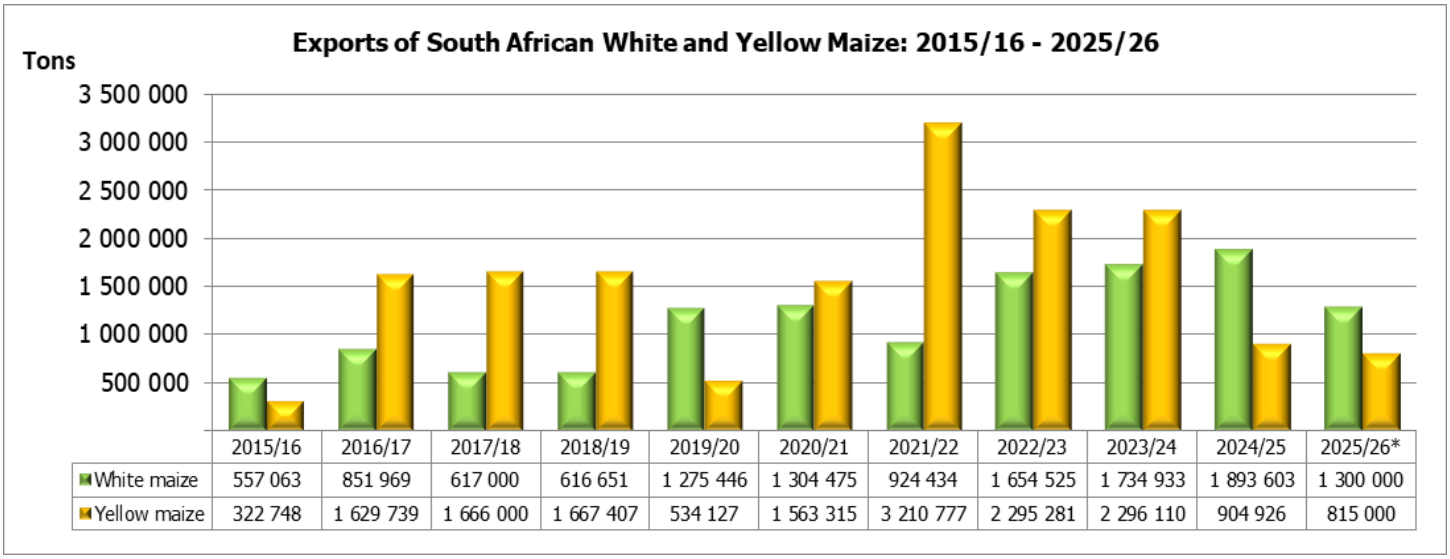
Graph 1: Major countries of wheat imports to South Africa: 2024/25 marketing year



- The progressive wheat imports (human consumption) for the 2024/25 marketing year (28 September 2024 to 25 July 2025) amount to 1 405 325 tons, with 28,85% or 405 491 tons from Australia, followed by 26,39% or 370 935 tons from Russian Federation, 13,82% or 194 149 tons from Lithuania, 9,67% or 135 876 tons from Canada, 6,57% or 92 326 tons from Poland, 5,95% or 83 678 tons from Latvia, 3,14% or 44 148 tons from Germany, 2,87% or 40 314 tons from Romania, 1,95% or 27 404 tons from Argentina and only 0,78% or 11 004 tons from the United States. The exports of wheat (human consumption) for the above-mentioned period amount to 184 202 tons, of which 37,70% or 69 444 tons went to Zambia, 32,89% or 60 585 tons went to Zimbabwe, 29,33% or 54 032 tons went to BLNS countries (Botswana, Lesotho, Namibia and Eswatini (former Swaziland)), and only 0,08% or 141 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

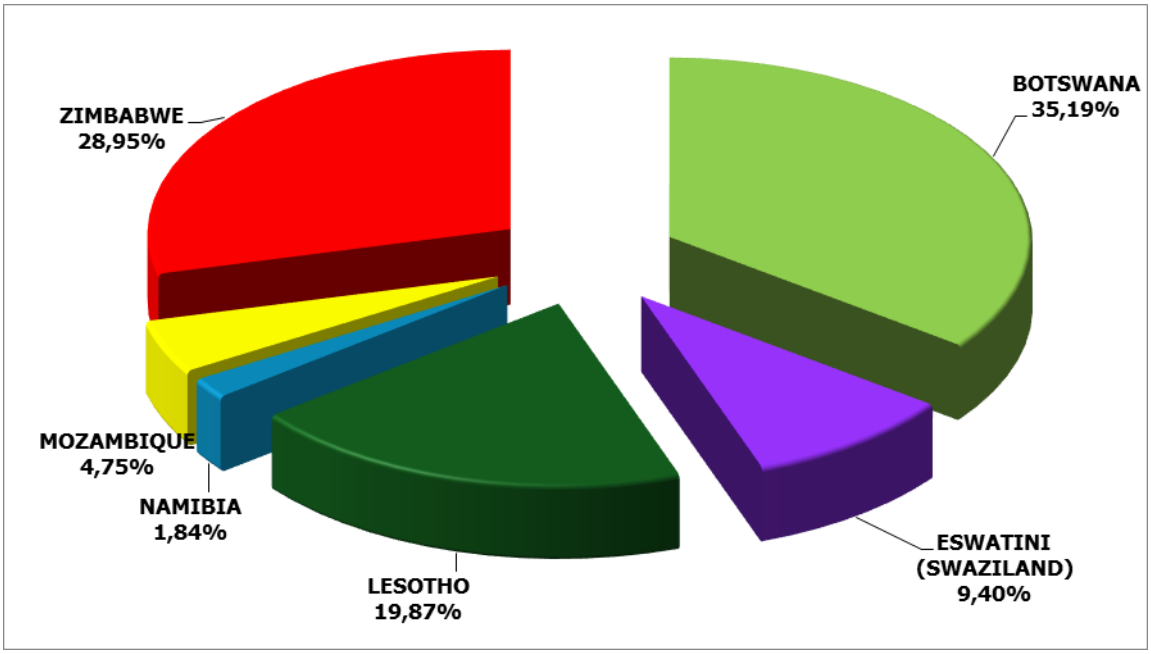


	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26*
White maize	557 063	851 969	617 000	616 651	1 275 446	1 304 475	924 434	1 654 525	1 734 933	1 893 603	1 300 000
Yellow maize	322 748	1 629 739	1 666 000	1 667 407	534 127	1 563 315	3 210 777	2 295 281	2 296 110	904 926	815 000

*Projection

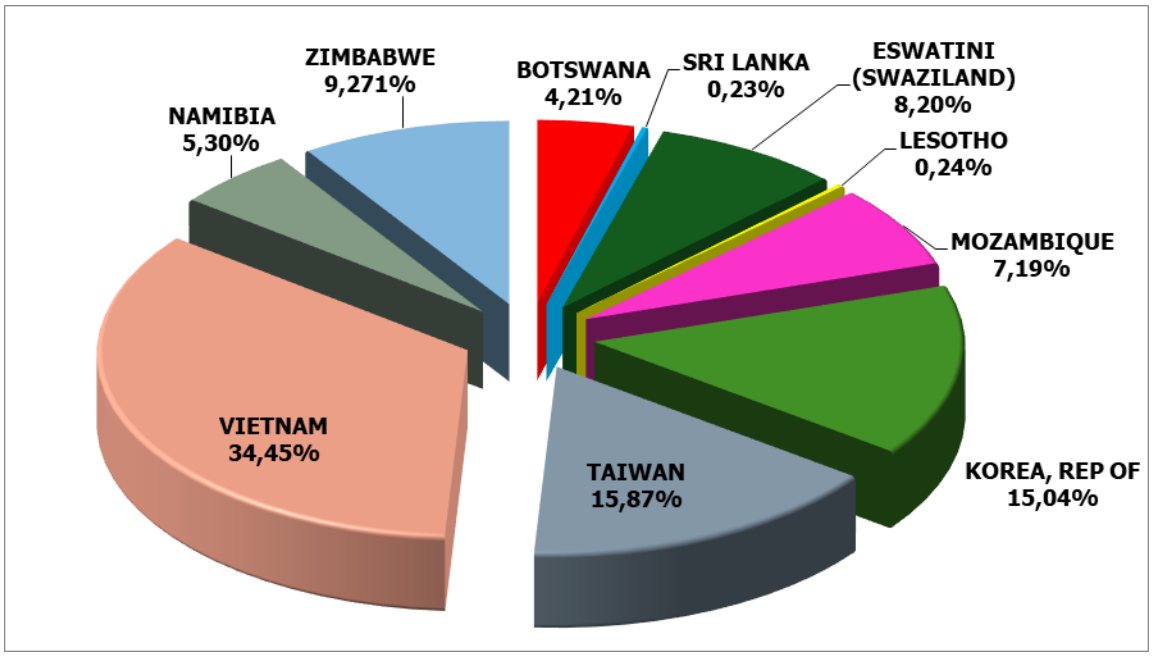
- The exports of white maize for the 2025/26 marketing year are projected at 1,300 million tons, which represents a decrease of 31,35% or 593 603 tons compared to the 1,894 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 815 000 tons, which represents a decrease of 9,94% or 89 926 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 25 July 2025, progressive white maize exports for the 2025/26 marketing year amount to 112 267 tons, with the main destinations being Botswana (35,19% or 39 512 tons), followed by Zimbabwe (28,95% or 32 504 tons), Lesotho (19,87% or 22 303 tons), Eswathini (Swaziland) (9,40% or 10 556 tons), Mozambique (4,75% or 5 329 tons) and Namibia (1,84% or 2 063 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 25 July 2025, progressive yellow maize exports for the 2025/26 marketing year amount to 316 708 tons, with the main destinations being, Vietnam (34,45% or 109 120 tons), followed by Taiwan

(15,87% or 50 255 tons), Republic of Korea (15,04% or 47 633 tons), Zimbabwe (9,27% or 29 361 tons), Eswathini (Swaziland) (8,20% or 25 980 tons), Mozambique (7,19% or 22 760 tons), Namibia (5,30% or 16 783 tons), Botswana (4,21% or 13 335 tons), Lesotho (0,24% or 768 tons) and Sri Lanka (0,23% or 713 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 3,0% in June 2025, up from 2,8% in May 2025. The CPI increased by 0,3% month-on-month in June 2025.
- The main positive contributors to the 3,0% annual inflation rate were:
  - Housing and utilities (4,4% and contributing 1,0%);
  - Food and non-alcoholic beverages (5,1% and contributing 0,9%); and
  - Alcoholic beverages and tobacco (4,4% and contributing 0,2%).
- In June 2025, the annual inflation rate for goods was 2,3%, up from 1,8% in May 2025; and services was 3,7%, up from 3,6% in May 2025.

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 0,6% in June 2025, compared with 0,1% in May 2025. The producer price index (PPI) increased by 0,2% month-on-month in June 2025. The main positive contributor to the headline PPI annual inflation rate was food products, beverages and tobacco products (4,0% and contributing 1,2%). The main contributor to the monthly rate was food products, beverages and tobacco products (0,6% and contributing 0,2%).
- The annual percentage change in the PPI for intermediate manufactured goods was 5,5% in June 2025, compared with 6,9% in May 2025. The index decreased by 0,7% month-on-month. The main positive contributor to the annual rate was basic and fabricated metals (11,8% and contributing 5,9%). The main contributor to the monthly rate was chemicals, rubber and plastic products (-2,9% and contributing -0,8%).
- The annual percentage change in the PPI for electricity and water was 10,7% in June 2025, compared with 10,8% in May 2025. The index increased by 31,2% month-on-month. The contributors to the annual rate were electricity (11,1% and contributing 9,9%) and water (4,6% and contributing 0,5%). The main contributor to the monthly rate was electricity (35,9% and contributing 31,1%).
- The annual percentage change in the PPI for mining was 4,8% in June 2025, compared with 2,8% in May 2025. The index increased by 1,7% month-on-month. The positive contributors to the annual rate were gold and other metal ores (17,4% and contributing 4,6%); non-ferrous metal ores (2,2% and contributing 1,1%); and stone quarrying, clay and diamonds (25,9% and contributing 1,1%). The positive contributor to the monthly rate was non-ferrous metal ores (5,3% and contributing 2,6%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was 5,0% in June 2025, compared with 6,0% in May 2025. The index increased by 0,3% month-on-month. The main contributors to the annual rate were agriculture (4,8% and contributing 4,2%) and fishing (9,4% and contributing 0,8%). The contributor to the monthly rate was agriculture (0,3% and contributing 0,3%)

4.3 Future contract prices

Table 5: Closing prices on Monday, 4 August 2025

	4 August 2025	4 July 2025	% Change
RSA White Maize per ton (Aug. 2025 contract)	R4 661,00	R4 729,00	-1,43
RSA Yellow Maize per ton (Aug. 2025 contract)	R4 021,00	R4 177,00	-3,73
RSA Wheat per ton (Aug. 2025 contract)	R6 720,00	R6 405,00	4,92
RSA Sunflower seed per ton (Aug. 2025 contract)	R9 799,00	R9 577,00	2,32
RSA Soya-beans per ton (Aug. 2025 contract)	R7 199,00	R7 336,00	-1,87
Exchange rate R/$	R18,03	R17,60	2,44

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- June 2025 tractor sales of 636 units were almost 31% more than the 487 units sold in June 2024. Year-to-date tractor sales are now approximately 21% up on 2024. Thirteen combine harvesters were sold in June 2025, eight less than the 21 units sold in June 2024. On a year-to-date basis, combine harvester sales are now almost 30% up on 2024.
- Summer crop prospects are looking good, despite the late rains and the negative effect these may have had on the quality of some of the harvests. The overall maize harvest is expected to be 15% up, with production in the North West province predicted to be almost 90% up on last season. Production of all other summer crops is also expected to be significantly up on last season. Looking ahead to the forthcoming summer cropping season, farmers are going to be pressed time-wise to harvest, prepare their lands and plant in time.
- Current predictions are that tractor sales will be 10% 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	Year-to-date		Percentage
	June		**Change %**	**June**		**Change %**
	2025	**2024**		**2025**	**2024**	
Tractors	636	487	30,60	3 562	2 936	21,32
Combine harvesters	13	21	-38,10	161	124	29,84

Source: SAAMA press release, July 2025

PLEASE NOTE: The Food Security Bulletin for August 2025 will be released on **5 September 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