MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA JUNE 2025

Issued: 4 July 2025

Directorate: Statistics and Economic Analysis

- **According to the latest Seasonal Climate Watch of the South African Weather Service for the period July to November 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 589 538 tons, which includes imports of 1,700 million tons. It is also 21,4% less than the previous years' ending stocks.**
- **The expected commercial maize crop for 2025 is 14,783 million tons, which is 15,0% 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 1,694 million tons, which is 159,2% more than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the current 2025/26 marketing year are 74 037 tons, which is 14,3% less than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2025/26 marketing year are 78 779 tons, which is 8,2% more than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the current 2025/26 marketing year are 424 129 tons, which is 201,4% more than the previous years' ending stocks.**
- **The annual percentage change in the CPI was unchanged at 2,8% in May 2025.**
- **The annual percentage change in the PPI for final manufactured goods was lower at 0,1% in May 2025.**
- **May 2025 tractor sales of 635 units were 12% more than the 566 units sold in May 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 July to November 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.

During late winter and early and mid-spring, the areas that receive significant seasonal rainfall is limited to the southwestern parts of the country and the southern and eastern coastal areas. During Late winter and early spring, the south-western parts of the country is still expected to receive below-normal rainfall. The eastern coastal areas however are expected to receive above-normal rainfall during early and mid-spring.

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

1.2 Level of dams

Available information on the level of South Africa's dams on 30 June 2025 indicates that the country has approximately 96% of its full supply capacity (FSC) available, which is 11,0% more as compared to the corresponding period in 2024. The North West Province (28%), Northern Cape (28%), Free State (16%), Gauteng (15%), KwaZulu-Natal (8%), Limpopo (6%) and Mpumalanga (5%) all show increases in the full supply capacity as compared to 2024. However, the Eastern Cape Province remained unchanged, while the Western Cape Province (-3%) 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, 30 June 2025

Province	Net FSC million cubic meters	**30/06/2025 (%)**	Last Year (2024) (%)	% Increase/Decrease 2025 vs. 2024
Kingdom of Eswatini	334	99	99	-
Eastern Cape	1 728	83	83	-
Free State	15 657	101	85	16,0
Gauteng	128	101	86	15,0
KwaZulu-Natal	4 910	98	90	8,0
Kingdom of Lesotho	2 363	98	88	10,0
Limpopo	1 485	87	81	6,0
Mpumalanga	2 538	99	94	5,0
Northern Cape	146	98	70	28,0
North West	866	101	73	28,0
Western Cape	1 866	68	71	-3,0
Total	32 021	96	85	11,0

Source: Department of Water and Sanitation

2. Grain production

2.1 Summer grain crops - 2025

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

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

CROP	**Area planted** **2025** **Ha** **(A)**	5th 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**	**7 648 450**	1 554 750	6 055 000	26,32%
Yellow maize	**997 000**	**7 134 800**	1 081 500	6 795 000	5,00%
Total Maize	**2 596 700**	**14 783 250**	2 636 250	12 850 000	15,04%
Sunflower seed	**555 700**	**727 800**	529 000	632 000	15,16%
Soybeans	**1 151 000**	**2 648 025**	1 150 500	1 848 000	43,29%
Groundnuts	**48 125**	**63 510**	41 200	52 000	22,13%
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**	**18 434 854**	4 438 600	15 530 495	18,70%

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 14 783 250 tons, which is 15,04% or 1 933 250 tons more than the 12 850 000 tons of the previous season (2024). The yield for maize is 5,69 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 7 648 450 tons, which is 26,32% or 1 593 450 tons more than the 6 055 000 tons of last season. The yield for white maize is 4,78 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 7 134 800 tons, which is 5,00% or 339 800 tons more than the 6 795 000 tons of last season. The yield for yellow maize is 7,16 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 727 800 tons, which is 15,16% or 95 800 tons more than the 632 000 tons of the previous season. The expected yield is 1,31 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 2 648 025 tons, which is 43,29% or 800 025 tons more than the 1 848 000 tons of the previous season. The expected yield is 2,30 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 63 510 tons – which is 22,13% or 11 510 tons more than the 52 000 tons of last season. The expected yield is 1,32 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 sixth production forecast for summer field crops for 2025 will be released on 29 July 2025.

2.2 Winter cereal crops – 2025

Please note that the preliminary area estimate of winter crops for 2025 will be released on 29 July 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 3: 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

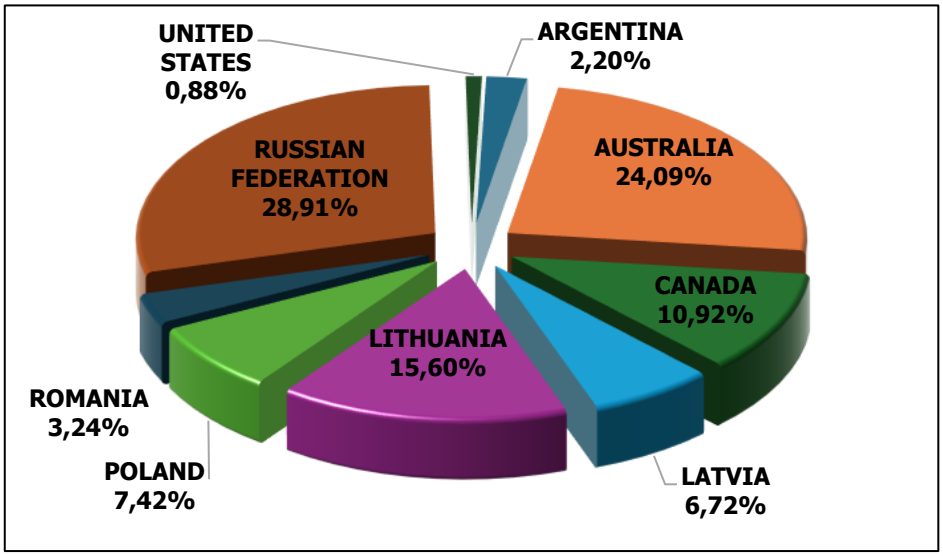
- The area planted to maize in the non-commercial agricultural sector is estimated at 358 000 ha, which represents an increase of 3,17%, compared to the 347 000 ha of the previous season. The expected maize crop for this sector is 621 500 tons, which is 8,09% more than the 575 000 tons of last season. 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 JUNE25 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

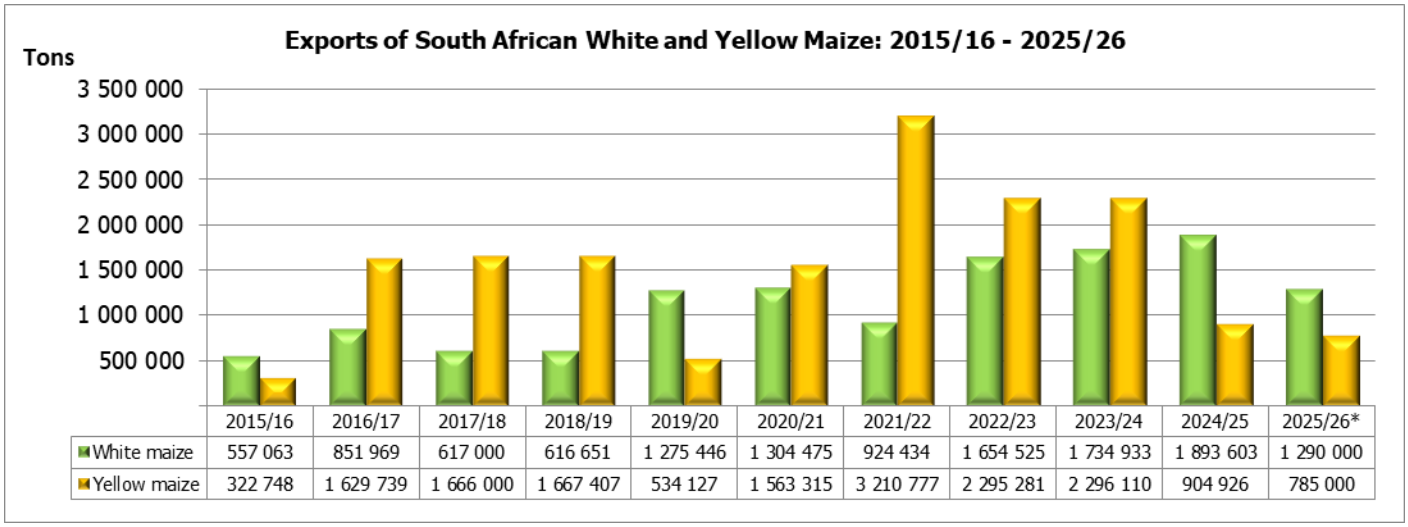


- The progressive wheat imports (human consumption) for the 2024/25 marketing year (28 September 2024 to 27 June 2025) amount to 1 244 328 tons, with 28,91% or 359 745 tons from Russian Federation, followed by 24,09% or 299 803 tons from Australia, 15,60% or 194 149 tons from Lithuania, 10,92% or 135 876 tons from Canada, 7,42% or 92 326 tons from Poland, 6,72% or 83 678 tons from Latvia, 3,24% or 40 314 tons from Romania, 2,20% or 27 433 tons from Argentina and only 0,88% or 11 004 tons from the United States. The

exports of wheat (human consumption) for the above-mentioned period amount to 165 099 tons, of which 35,44% or 58 506 tons went to Zimbabwe, 35,07% or 57 900 tons went to Zambia, 13,84% or 22 842 tons went to Botswana, 11,29% or 18 633 tons went to Lesotho, and only 4,37% or 7 218 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

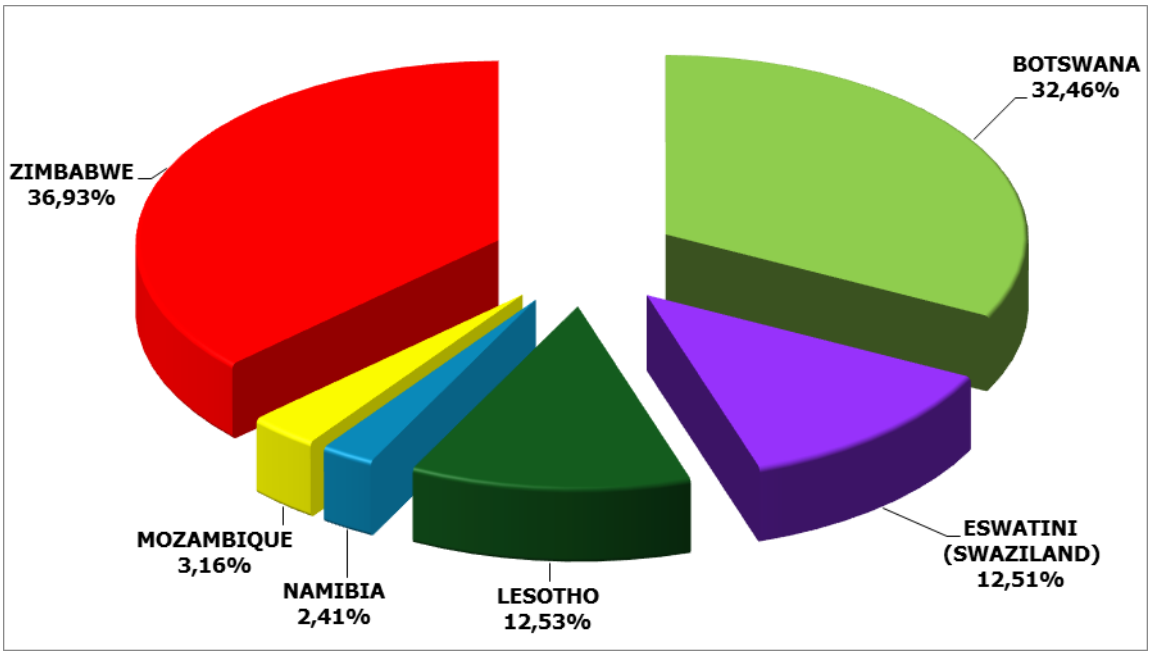


	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26*
White maize	557 063	851 969	617 000	616 651	1 275 446	1 304 475	924 434	1 654 525	1 734 933	1 893 603	1 290 000
Yellow maize	322 748	1 629 739	1 666 000	1 667 407	534 127	1 563 315	3 210 777	2 295 281	2 296 110	904 926	785 000

*Projection

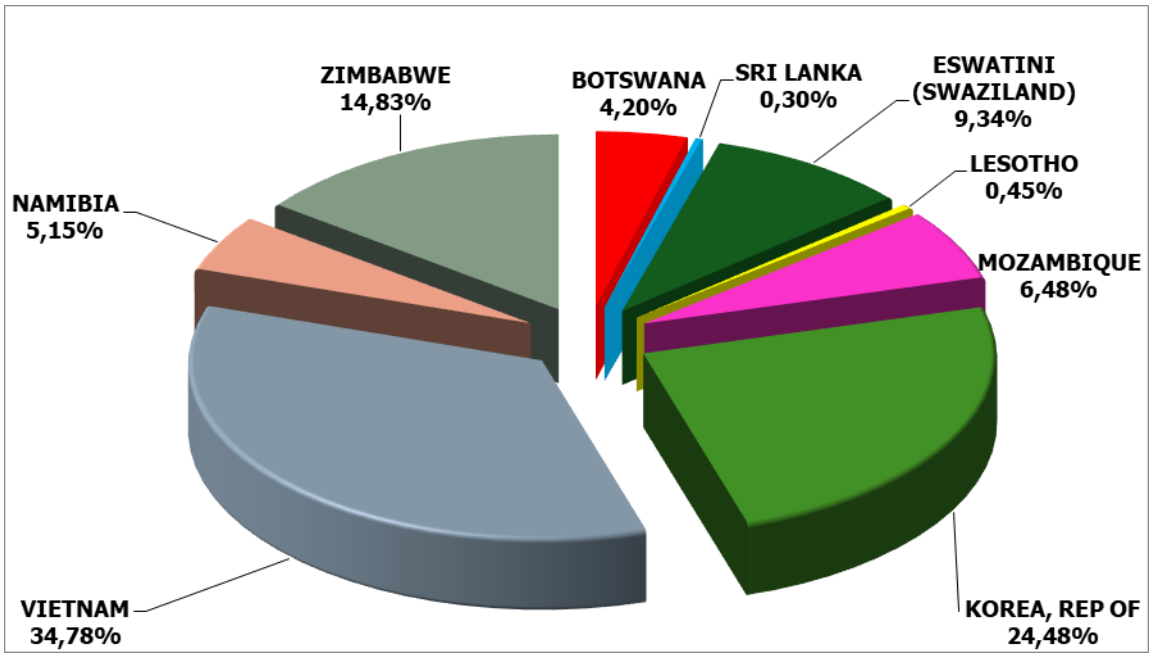
- The exports of white maize for the 2025/26 marketing year are projected at 1,290 million tons, which represents a decrease of 31,88% or 603 603 tons compared to the 1,894 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 785 000 tons, which represents a decrease of 13,25% or 119 926 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 27 June 2025, progressive white maize exports for the 2025/26 marketing year amount to 84 029 tons, with the main destinations being Zimbabwe (36,93% or 31 032 tons), followed by Botswana (32,46% or 27 276 tons), Lesotho (12,53% or 10 530 tons), Eswathini (Swaziland) (12,51% or 10 510 tons), Mozambique (3,16% or 2 652 tons) and Namibia (2,41% or 2 029 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 27 June 2025, progressive yellow maize exports for the 2025/26 marketing year amount to 194 565 tons, with the main destinations being, Vietnam (34,78% or 67 675 tons), followed by Republic of Korea (24,48% or 47 632 tons), Zimbabwe (14,83% or 28 848 tons), Eswathini (Swaziland) (9,34% or 18 164 tons), Mozambique (6,48% or 12 608 tons), Namibia (5,15% or 10 023 tons), Botswana (4,20% or 8 166 tons), Lesotho (0,45% or 866 tons) and Sri Lanka (0,30% or 583 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 2,8% in May 2025, unchanged from 2,8% in April 2025. The CPI increased by 0,2% month-on-month in May 2025.
- The main contributors to the 2,8% annual inflation rate were:
  - Housing and utilities (4,5% and contributing 1,0%);
  - Food and non-alcoholic beverages (4,8% and contributing 0,9%); and
  - Alcoholic beverages and tobacco (4,3% and contributing 0,2%).
- In May 2025, the annual inflation rate for goods was 1,8%, up from 1,7% in April 2025; and services was 3,6%, down from 3,8% in April 2025

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 0,1% in May 2025, compared with 0,5% in April 2025. The producer price index (PPI) decreased by 0,3% month-on-month in May 2025. The main positive contributor to the headline PPI annual inflation rate was food products, beverages and tobacco products (3,7% and contributing 1,1%). The main contributor to the monthly rate was food products, beverages and tobacco products (-0,2% and contributing -0,1%).
- The annual percentage change in the PPI for intermediate manufactured goods was 6,9% in May 2025, compared with 8,5% in April 2025. The index decreased by 0,9% month-on-month. The main contributors to the annual rate were basic and fabricated metals (12,3% and contributing 6,1%) and chemicals, rubber and plastic products (1,4% and contributing 0,4%). The main contributor to the monthly rate was basic and fabricated metals (-1,3% and contributing -0,7%).
- The annual percentage change in the PPI for electricity and water was 10,8% in May 2025, compared with 11,2% in April 2025. The index increased by 1,3% month-on-month. The contributors to the annual rate were

electricity (11,9% and contributing 10,2%) and water (4,6% and contributing 0,7%). The main contributor to the monthly rate was electricity (1,5% and contributing 1,3%).

- The annual percentage change in the PPI for mining was 2,8% in May 2025, compared with 4,1% in April 2025. The index decreased by 2,0% month-on-month. The positive contributors to the annual rate were gold and other metal ores (19,6% and contributing 5,2%) and stone quarrying, clay and diamonds (28,6% and contributing 1,3%). The negative contributors to the monthly rate were non-ferrous metal ores (-3,7% and contributing -1,9%) and gold and other metal ores (-3,4% and contributing -1,0%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was 6,0% in May 2025, compared with 4,4% in April 2025. The index increased by 0,2% month-on-month. The main contributor to the annual rate was agriculture (5,9% and contributing 5,1%). The main contributor to the monthly rate was fishing (4,8% and contributing 0,4%).

4.3 Future contract prices

Table 4: Closing prices on Thursday, 3 July 2025

	3 July 2025	3 June 2025	% Change
RSA White Maize per ton (July 2025 contract)	R4 660,00	R4 569,00	1,99
RSA Yellow Maize per ton (July 2025 contract)	R4 163,00	R4 107,00	1,36
RSA Wheat per ton (July 2025 contract)	R6 448,00	R6 449,00	-0,02
RSA Sunflower seed per ton (July 2025 contract)	R9 448,00	R8 982,00	5,19
RSA Soya-beans per ton (July 2025 contract)	R7 300,00	R7 300,00	-
Exchange rate R/$	R17,51	R17,89	-2,12

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- May 2025 tractor sales of 635 units were 12% more than the 566 units sold in May 2024. Year-to-date tractor sales are now almost 20% up on last year. Forty-one combine harvesters were sold in May 2025, 16 more than the 25 units sold in May 2024. On a year-to-date basis, combine harvester sales are now almost 44% up on last year.
- Market sentiment continues to be positive, and this is reflected in the good sales of tractors and combine harvesters for the year so far. Farmers are still harvesting their crops and yields are generally looking good, although the quality has, in some cases, been adversely affected by the late rains. Some farmers are holding back on buying equipment until their summer crops have been harvested and they know what the yield and quality of their crops.
- Current predictions are that tractor sales will be between 5 and 10% more than last year. Combine harvester sales in 2025 also look as though they are going to be higher than last year.

Table 5: Agricultural machinery sales

Equipment class	Year-on-year		Percentage	Year-to-date		Percentage
	May		**Change**	**May**		**Change**
	2025	**2024**	**%**	**2025**	**2024**	**%**
Tractors	635	566	12,19	2 926	2 449	19,48
Combine harvesters	41	25	64,00	148	103	43,69

Source: SAAMA press release, June 2025

PLEASE NOTE: The Food Security Bulletin for July 2025 will be released on **6 August 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