MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA MARCH 2026

Issued: 10 April 2026

Directorate: Statistics and Economic Analysis

- **During March 2026, significant rainfall events were limited to the north and eastern parts of the country.**
- **The projected closing stocks of wheat for the 2025/26 marketing year are 465 114 tons, which includes imports of 1,800 million tons. It is also 28,5% less than the previous years' ending stocks.**
- **The expected commercial maize crop for 2026 is 16,508 million tons, which is 0,8% 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 2,750 million tons, which is 320,6% more than the previous years' ending stocks.**
- **Projected closing stocks of maize for the coming 2026/27 marketing year are 3,764 million tons, which is 36,9% more than the previous years' ending stocks**
- **The projected closing stocks of sorghum for the current 2026/27 marketing year are 81 270 tons, which is 10,2% less than the previous year's ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2026/27 marketing year are 71 247 tons, which is 52,9% more than the previous year's ending stocks.**
- **The projected closing stocks of soybeans for the current 2026/27 marketing year are 388 194 tons, which is 35,5% more than the previous year's ending stocks.**
- **The annual percentage change in the CPI was lower at 3,0% in February 2026.**
- **The annual percentage change in the PPI for final manufactured goods was lower at 1,8% in February 2026.**
- **March 2026 tractor sales of 618 units were almost 8% less than the 671 units sold in March 2025.**

agriculture

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1. Weather conditions

1.1 Rainfall for March 2026

During March 2026, significant rainfall events were limited to the north and eastern parts of the country (**Figure 1**). Comparing rainfall totals to the long-term average for March 2026, the north-eastern parts of the Northern Cape, far western regions of North West, north-eastern parts of Mpumalanga and most of Limpopo received above-normal rainfall (**Figure 2**). The southern half of the country received below-normal rainfall and remaining regions of the country received normal rainfall. (Source: Directorate: Climate Change and Disaster Management of Department: Agriculture)

Figure 1: Rainfall (mm) for March 2026

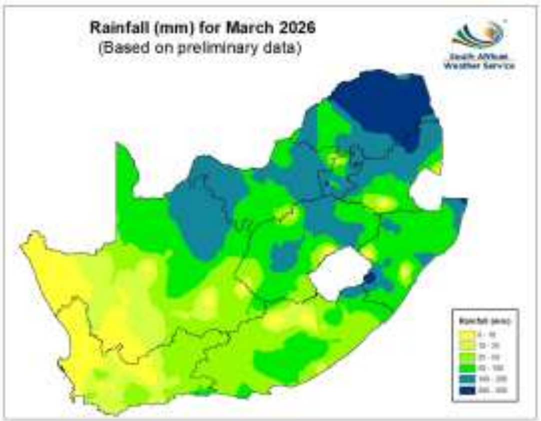
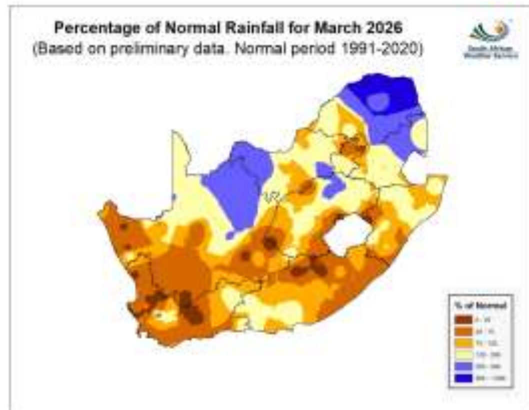


Figure 2: Percentage rainfall for March 2026



1.2 Level of dams

Available information on the level of South Africa's dams on 6 April 2026 indicates that the country has approximately 95% of its full supply capacity (FSC) available, which is 1,0% more as compared to the corresponding period in 2025. The Limpopo (12%), Northern Cape (8%) and Free State (4%) provinces, all show increases in the full supply capacity as compared to 2025. However, the Western Cape (-16%), KwaZulu-Natal (-6%), Gauteng (-5%), Eastern Cape (-4%), and North West (-1%) provinces, show decreases in the full supply capacity as compared to 2025. The Mpumalanga Province shows no change in the full supply capacity for the same period.

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

Table 1: Level of dams, 6 April 2026

Province	Net FSC million cubic meters	6/04/2026 (%)	Last Year (2025) (%)	% Increase/Decrease 2026 vs. 2025
Eastern Cape	1 726	80	84	-4,0
Free State	15 665	101	97	4,0
Gauteng	128	101	106	-5,0
Kindom of Lesotho	2 363	100	100	-
Kingdom of Eswatini	334	100	100	-
Kwazulu-Natal	4 910	92	98	-6,0
Limpopo	1 485	102	90	12,0
Mpumalanga	2 538	100	100	-
North West	866	101	102	-1,0
Northern Cape	149	97	89	8,0
Western Cape	1 866	43	59	-16,0
Total	32 030	**95**	**94**	1,0

Source: Department of Water and Sanitation

2. Grain production

2.1 Summer grain crops - 2026

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

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

CROP	**Area planted 2026 Ha (A)**	**2nd forecast 2026 Tons (B)**	Area planted 2025 Ha (C)	Final estimate 2025 Tons (D)	Change 2026 vs 2025 % (B) ÷ (d)
Commercial:					
White maize	**1 664 700**	**8 757 850**	1 599 700	8 450 000	3,64%
Yellow maize	**1 051 500**	**7 750 450**	997 000	8 200 000	-5,48%
Total Maize	**2 716 200**	**16 508 300**	2 596 700	16 650 000	-0,85%
Sunflower seed	**570 100**	**778 155**	555 700	700 000	11,17%
Soybeans	**1 212 700**	**2 729 975**	1 151 000	2 800 000	-2,50%
Groundnuts	**44 650**	**69 360**	48 125	63 350	9,49%
Sorghum	**45 000**	**140 653**	41 150	150 000	-6,23%
Dry beans	**40 950**	**80 704**	45 620	90 556	-10,88%
TOTAL	**4 629 600**	**20 307 147**	4 438 295	20 453 906	-0,72%

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

- The 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.
- The area estimate for **white maize** is 1 664 700 ha, which represents an increase of 4,06% or 65 000 ha compared to the 1 599 700 ha planted last season. The production forecast of white maize is 8 757 850 tons, which is 3,64% or 307 850 tons more than the 8 450 000 tons of last season. The yield for white maize is 5,26 t/ha.
- In the case of **yellow maize,** the area estimate is 1 051 500 ha, which is 5,47% or 54 500 ha more than the 997 000 ha planted last season. The yellow maize production forecast is 7 750 450 tons, which is 5,48% or 449 550 tons less than the 8 200 000 tons of last season. The yield for yellow maize is 7,37 t/ha.
- The area estimate for **sunflower seed** is 570 100 ha, which is 2,59% or 14 400 ha more than the 555 700 ha planted the previous season. The production forecast for sunflower seed is 778 155 tons, which is 11,17% or 78 155 tons more than the 700 000 tons of the previous season. The expected yield is 1,36 t/ha.
- It is estimated that 1 212 700 ha have been planted to **soybeans**, which represents an increase of 5,36% or 61 700 ha compared to the 1 151 000 ha planted last season. The production forecast is 2 729 975 tons, which is 2,50% or 70 025 tons less than the 2 800 000 tons of the previous season. The expected yield is 2,25 t/ha.
- For **groundnuts**, the area estimate is 44 650 ha, which is 7,22% or 3 475 ha less than the 48 125 ha planted for the previous season. The expected crop is 69 360 tons – which is 9,49% or 6 010 tons more than the 63 350 tons of last season. The expected yield is 1,55 t/ha.
- The area estimate for **sorghum** is 45 000 ha, an increase of 9,36% or 3 850 ha against the 41 150ha of the previous season. The production forecast for sorghum is 140 653 tons, which is 6,23% or 9 348 tons less than the 150 000 tons of the previous season. The expected yield is 3,13 t/ha.
- For **dry beans**, the area estimate is 40 950 ha, which is 10,24% or 4 670 ha less than the 45 620 ha planted for the previous season. The production forecast is 80 704 tons, which is 10,88% or 9 852 tons less than the 90 556 tons of the previous season. The expected yield is 1,97 t/ha.

The area planted and third production forecast will be released by the Crop Estimates Committee on 23 April 2026.

2.2 Winter cereal crops – 2025

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

2.3 Non-commercial maize - 2026

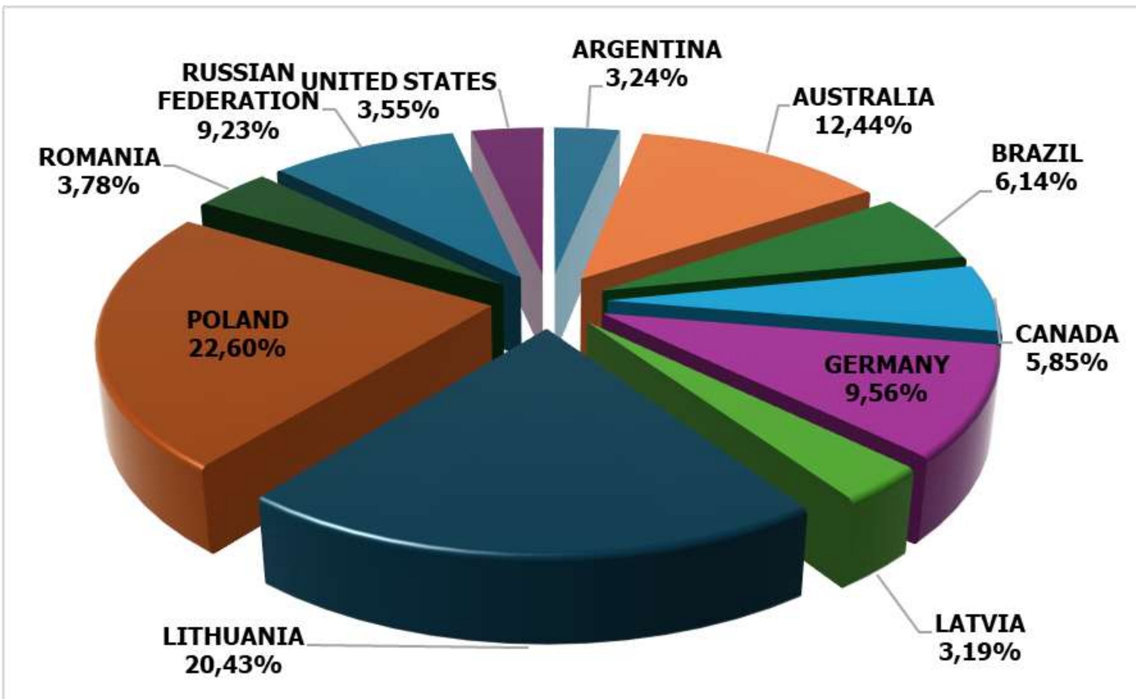
Please note that the preliminary area planted and production estimate of the non-commercial maize sector for the 2026 season will be published on 23 April 2026.

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 MAR26 Annexure A.

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

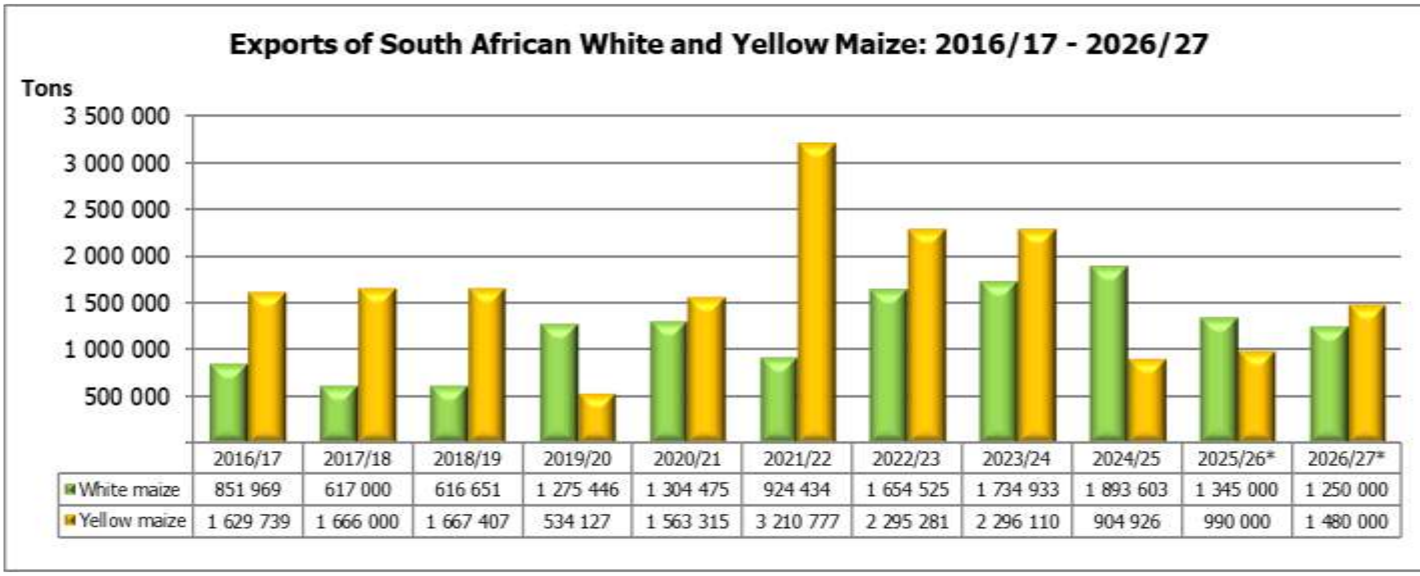
Graph 1: Major countries of wheat imports to South Africa: 2025/26 marketing year



- The progressive wheat imports (human consumption) for the 2025/26 marketing year (27 September 2025 to 27 March 2026) amount to 937 703 tons, with 22,60% or 211 938 tons from Poland, followed by 20,43% or 191 556 tons from Lithuania, 12,44% or 116 634 tons from Australia, 9,56% or 89 643 tons from Germany, 9,23% or 86 554 tons from Russian Federation, 6,14% or 57 601 tons from Brazil, 5,85% or 54 882 tons from Canada, 3,78% or 35 432 tons from Romania, 3,55% or 33 244 tons from the United States, 3,24% or 30 336 tons from Argentina and only 3,19% or 29 883 tons from Latvia. The exports of wheat (human consumption) for the above-mentioned period amount to 28 796 tons, of which 33,41% or 9 620 tons went to Botswana, 26,46% or 7 620 tons went to Lesotho, 21,80% or 6 277 tons went to Zimbabwe, 14,77% or 4 254 tons went to Zambia and only 3,56% or 1 025 tons went to Namibia.

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



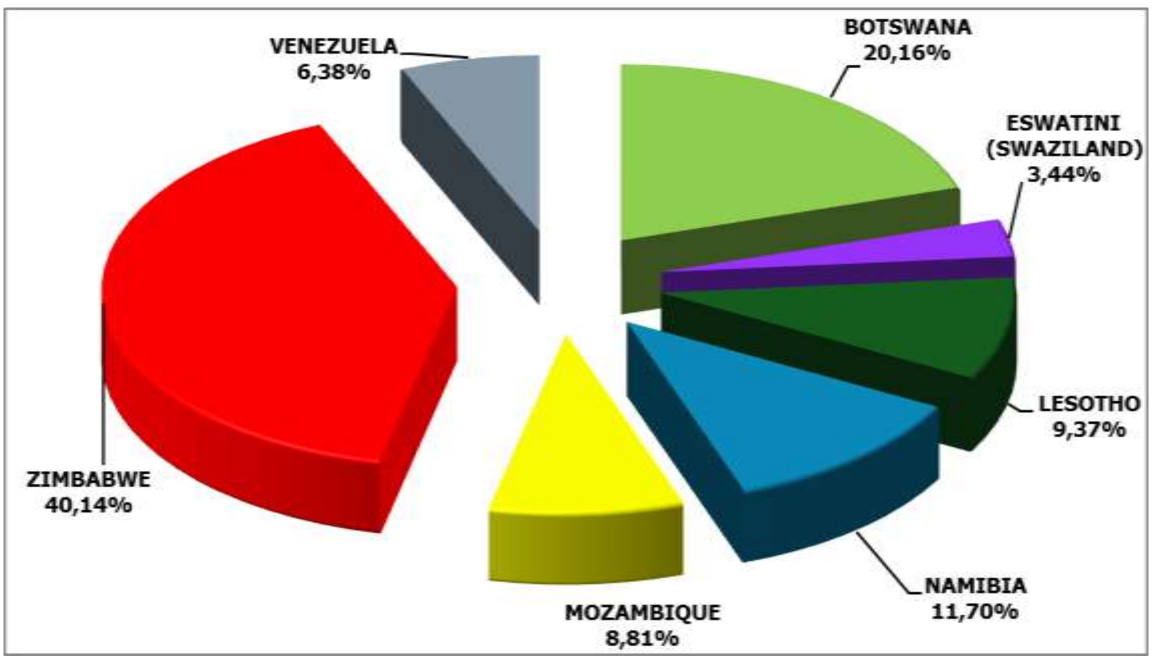
	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26*	2026/27*
White maize	851 969	617 000	616 651	1 275 446	1 304 475	924 434	1 654 525	1 734 933	1 893 603	1 345 000	1 250 000
Yellow maize	1 629 739	1 666 000	1 667 407	534 127	1 563 315	3 210 777	2 295 281	2 296 110	904 926	990 000	1 480 000

*Projection

- The exports of white maize for the 2025/26 marketing year are projected at 1,345 million tons, which represents a decrease of 28,97% or 548 603 tons compared to the 1,894 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 990 000 tons, which represents an increase of 9,40% or 85 074 tons compared to the 904 926 tons of the previous marketing year.

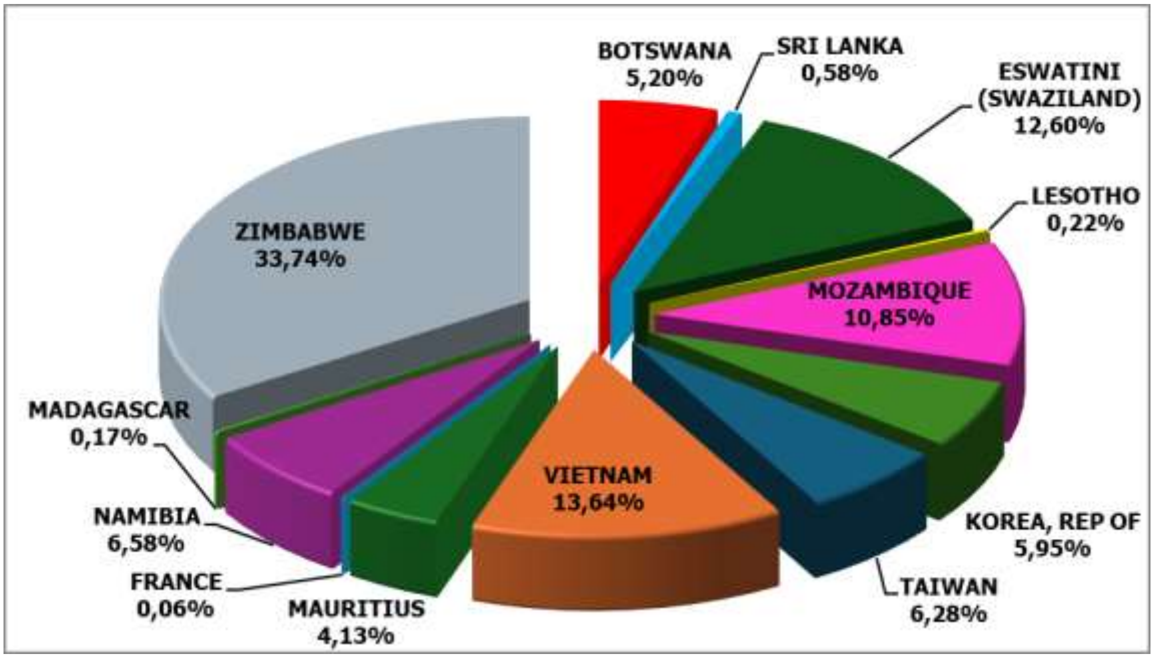
- The exports of white maize for the 2026/27 marketing year are projected at 1,250 million tons, which represents a decrease of 7,06% or 95 000 tons compared to the 1,345 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 1,480 million tons, which represents an increase of 49,49% or 490 000 tons compared to the 990 000 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 March 2026, progressive white maize exports for the 2025/26 marketing year amount to 1 033 700 tons, with the main destinations being Zimbabwe (40,14% or 414 918 tons), followed by Botswana (20,16% or 208 407 tons), Namibia (11,70% or 120 914 tons), Lesotho (9,37% or 96 901 tons), Mozambique (8,81% or 91 049 tons), Venezuela (6,38% or 66 001 tons) and Eswathini (Swaziland) (3,44% or 35 510 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 March 2026, progressive yellow maize exports for the 2025/26 marketing year amount to 799 986 tons, with the main destinations being, Zimbabwe (33,74% or 269 915 tons), followed by Vietnam (13,64% or 109 120 tons), Eswathini (Swaziland) (12,60% or 100 773 tons), Mozambique (10,85% or 86 796 tons), Namibia (6,58% or 52 631 tons), Taiwan (6,28% or 50 255 tons), Republic of Korea (5,95% or 47 633 tons), Botswana (5,20% or 41 610 tons), Mauritius (4,13% or 33 013 tons), Sri Lanka (0,58% or 4 660 tons), Lesotho (0,22% or 1 770 tons), Madagascar (0,17% or 1 330 tons) and France (0,06% 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 3,0% in February 2026, down from 3,5% in January 2026. The CPI increased by 0,4% month-on-month in February 2026.
- The main contributors to the 3,0% annual inflation rate were:
  - Housing and utilities (4,8% and contributing 1,1%);
  - Food and non-alcoholic beverages (3,7% and contributing 0,7%); and
  - Insurance and financial services (4,7% and contributing 0,5%).
- In February 2026, the annual inflation rate for:
  - Goods were 1,9%, down from 2,7% in January 2026; and
  - Services was 3,8%, down from 4,2% in January 2026.

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 1,8% in February 2026, compared with 2,2% in January 2026. The producer price index (PPI) remained unchanged month-on-month in February 2026. The main positive contributors to the headline PPI annual inflation rate were food products, beverages and tobacco products (2,3% and contributing 0,7%) and furniture and other manufacturing (12,1% and contributing 0,5%).

- The annual percentage change in the PPI for intermediate manufactured goods was 7,8% in February 2026, compared with 10,5% in January 2026. The index decreased by 0,7% month-on-month. The main positive contributors to the annual rate were basic and fabricated metals (21,7% and contributing 10,2%) and sawmilling and wood (8,4% and contributing 0,8%). The main negative contributor to the monthly rate was chemicals, rubber and plastic products (-1,9% and contributing -0,5%).
- The annual percentage change in the PPI for electricity and water was 15,4% in February 2026, compared with 16,7% in January 2026. The index increased by 0,3% month-on-month. The contributors to the annual rate were electricity (15,9% and contributing 13,1%) and water (11,6% and contributing 2,0%). The contributor to the monthly rate was electricity (0,3% and contributing 0,3%).
- The annual percentage change in the PPI for mining was 30,3% in February 2026, compared with 28,4% in January 2026. The index increased by 3,5% month-on-month. The positive contributors to the annual rate were non-ferrous metal ores (57,1% and contributing 24,9%) and gold and other metal ores (18,8% and contributing 5,3%). The main positive contributors to the monthly rate were non-ferrous metal ores (6,3% and contributing 3,2%) and coal and gas (3,7% and contributing 0,6%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was -5,1% in February 2026, compared with -5,8% in January 2026. The index decreased by 1,6% month-on-month. The negative contributor to the annual rate was agriculture (-7,1% and contributing -6,2%). The negative contributor to the monthly rate was agriculture (-2,1% and contributing -1,8%).

4.3 Future contract prices

Table 3: Closing prices on Thursday, 9 April 2026

	9 April 2026	9 March 2026	% Change
RSA White Maize per ton (Apr. 2026 contract)	R3 200,00	R3 379,00	-5,30
RSA Yellow Maize per ton (Apr. 2026 contract)	R3 310,00	R3 520,00	-5,96
RSA Wheat per ton (Apr. 2026 contract)	R5 698,00	R6 119,00	-6,88
RSA Sunflower seed per ton (Apr. 2026 contract)	R8 738,00	R9 391,00	-6,95
RSA Soya-beans per ton (Apr. 2026 contract)	R6 762,00	R7 047,00	-4,04
Exchange rate R/$	R16,46	R16,78	-1,91

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- March 2026 tractor sales of 618 units were almost 8% less than the 671 units sold in March 2025. On a year-to-date basis tractor sales are now approximately 2% up on last year. Twenty-nine combine harvesters were sold in March 2026, eight less than the 37 units sold in March 2025. On a year-to-date basis, combine harvester sales are now approximately 6% up on last year.
- Although market sentiment remains positive, several external factors, such as the value of the rand and the current diesel and fertilizer prices are currently holding farmers back from buying capital equipment. Summer crop production estimates are, in general, good. This is having an adverse effect on commodity prices. Farmers will soon start harvesting and they will then be in a better situation to evaluate conditions going forward into the next cropping season. Industry predictions of tractor sales for the 2026 calendar are that these will be similar, or marginally lower, than those in 2025.

Table 4: Agricultural machinery sales

Equipment class	Year-on-year March 2026	Year-on-year March 2025	Percentage Change %	Year-to-date March 2026	Year-to-date March 2025	Percentage Change %
Tractors	618	671	-7,90%	1 804	1 764	2,27%
Combine harvesters	29	37	-21,62%	65	61	6,56%

Source: SAAMA press release, April 2026

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

5. Acknowledgements

The Directorate: Statistics and Economic Analysis make 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