MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA MARCH 2025

Issued: 7 April 2025

Directorate: Statistics and Economic Analysis

- **According to the latest Seasonal Climate Watch of the South African Weather Service for the period April to August 2025, the El Niño-Southern Oscillation (ENSO) has recently returned to 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 698 128 tons, which includes imports of 1,82 million tons. It is also 6,9% less than the previous years' ending stocks.**
- **The expected commercial maize crop for 2025 is 14,559 million tons, which is 13,3% more than the 12,850 million tons of the previous season (2024).**
- **Projected closing stocks of maize for the current 2024/25 marketing year are 850 882 tons, which is 64,6% less than the previous years' ending stocks.**
- **Projected closing stocks of maize for the coming 2025/26 marketing year are 1,435 million tons, which is 68,6% more than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the current 2025/26 marketing year are 80 657 tons, which is 9,6% less than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2025/26 marketing year are 92 594 tons, which is 23,5% more than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the current 2025/26 marketing year are 234 322 tons, which is 65,8% more than the previous years' ending stocks.**
- **The annual percentage change in the CPI was unchanged at 3,2% in February 2025.**
- **The annual percentage change in the PPI for final manufactured goods was lower at 1,0% in February 2025.**
- **February 2025 tractor sales of 638 units were approximately 21% more than the 527 units sold in February 2024.**

agriculture, land reform & rural development

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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 April to August 2025, the El Niño-Southern Oscillation (ENSO) has recently returned to 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.

Due to the change of seasons into late autumn (Apr-May-Jun) and early- to mid-winter (May-Jun-Jul and Jun-Jul-Aug), the focus shifts to the south-western parts of the country and the southern and eastern coastal areas. The south-western parts of the country are expected to receive below-normal rainfall during the forecasted seasons and the southern and eastern coastal areas are expected to receive mostly above-normal rainfall.

Minimum temperatures are largely expected to be above-normal for the most part of the forecaster period. Maximum temperatures are expected to be above-normal as well with the notable exception of the southern and south-eastern coastal areas that is expected to have below-normal maximum temperatures.

1.2 Level of dams

Available information on the level of South Africa's dams on 31 March 2025 indicates that the country has approximately 92% of its full supply capacity (FSC) available, which is 7,0% more as compared to the corresponding period in 2024. The North West (29%), Gauteng (14%), KwaZulu-Natal (8%), Limpopo (7%), Free State (7,0%), Mpumalanga (3%) Western Cape (1%) and Eastern Cape (1%) provinces, all show increases in full supply capacity as compared to 2024. However, the Northern Cape Province (-3%) show a decrease in 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, 31 March 2025

Province	Net FSC million cubic meters	**31/03/2025 (%)**	Last Year (2024) (%)	% Increase/Decrease 2025 vs. 2024
Eastern Cape	1 731	82	81	1,0
Free State	15 657	92	85	7,0
Gauteng	128	102	88	14,0
Kingdom of Lesotho	2 363	99	94	5,0
Kingdom of Eswatini	334	100	100	-
KwaZulu-Natal	4 910	97	89	8,0
Limpopo	1 485	91	84	7,0
Mpumalanga	2 538	100	97	3,0
North West	866	100	71	29,0
Northern Cape	147	78	81	-3,0
Western Cape	1 918	61	60	1,0
Total	32 077	**92**	**85**	**7,0**

Source: Department of Water and Sanitation

2. Grain production

2.1 Summer grain crops - 2025

The revised area planted and second production forecast for summer grains for the 2025 season was released by the Crop Estimates Committee (CEC) on 26 March 2025, and is as follows:

Table 2: Commercial summer grains: Revised area planted and second production forecast- 2025 season

CROP	**Area planted** **2025** **Ha** **(A)**	2nd 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**	**7 695 200**	1 554 750	6 055 000	27,09%
Yellow maize	**997 000**	**6 863 400**	1 081 500	6 795 000	1,01%
Total Maize	**2 596 700**	**14 558 600**	2 636 250	12 850 000	13,30%
Sunflower seed	**555 700**	**770 500**	529 000	632 000	21,19%
Soybeans	**1 151 000**	**2 389 925**	1 150 500	1 848 000	29,32%
Groundnuts	**48 125**	**66 929**	41 200	52 000	28,71%
Sorghum	**41 150**	**137 435**	42 100	98 000	40,24%
Dry beans	**45 620**	**79 007**	39 550	50 495	56,46%
TOTAL	**4 438 295**	**18 002 396**	4 438 600	15 530 495	15,92%

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 14 558 600 tons, which is 13,30% or 1 708 600 tons more than the 12 850 000 tons of the previous season (2024). The yield for maize is 5,61 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 7 695 200 tons, which is 27,09% or 1 640 200 tons more than the 6 055 000 tons of last season. The yield for white maize is 4,81 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 6 863 400 tons, which is 1,01% or 68 400 tons more than the 6 795 000 tons of last season. The yield for yellow maize is 6,88 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 770 500 tons, which is 21,91% or 138 500 tons more than the 632 000 tons of the previous season. The expected yield is 1,39 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 2 389 925 tons, which is 29,32% or 541 925 tons more than the 1 848 000 tons of the previous season. The expected yield is 2,08 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 66 929 tons – which is 28,71% or 14 929 tons more than the 52 000 tons of last season. The expected yield is 1,39 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 137 435 tons, which is 40,24% or 39 435 tons more than the 98 000 tons of the previous season. The expected yield is 3,34 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 79 007 tons, which is 56,46% or 28 512 tons more than the 50 495 tons of the previous season. The expected yield is 1,73 t/ha.

Please note that the area planted and third production forecast for summer field crops for 2025 will be released on 30 April 2025.

2.2 Winter cereal crops – 2025

Please note that the intentions to plant winter cereals for 2025 will be released on 30 April 2025.

2.3 Non-commercial maize - 2024

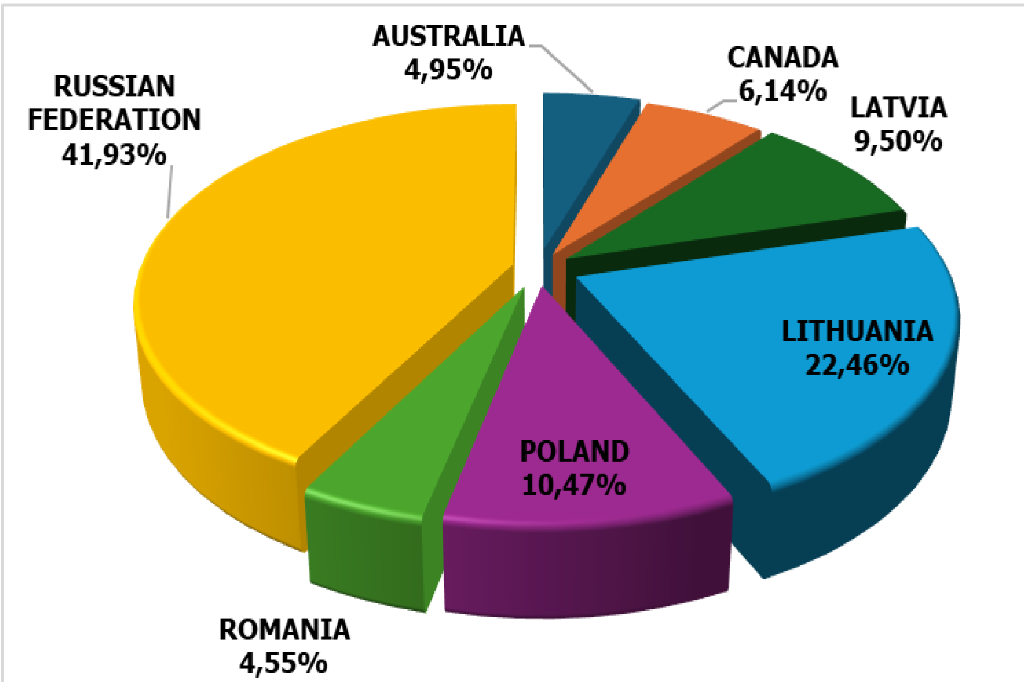
Please note that the area planted and production estimate of the non-commercial maize sector for the 2025 season will be released on 30 April 2025.

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 MAR25 Annexure A.

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

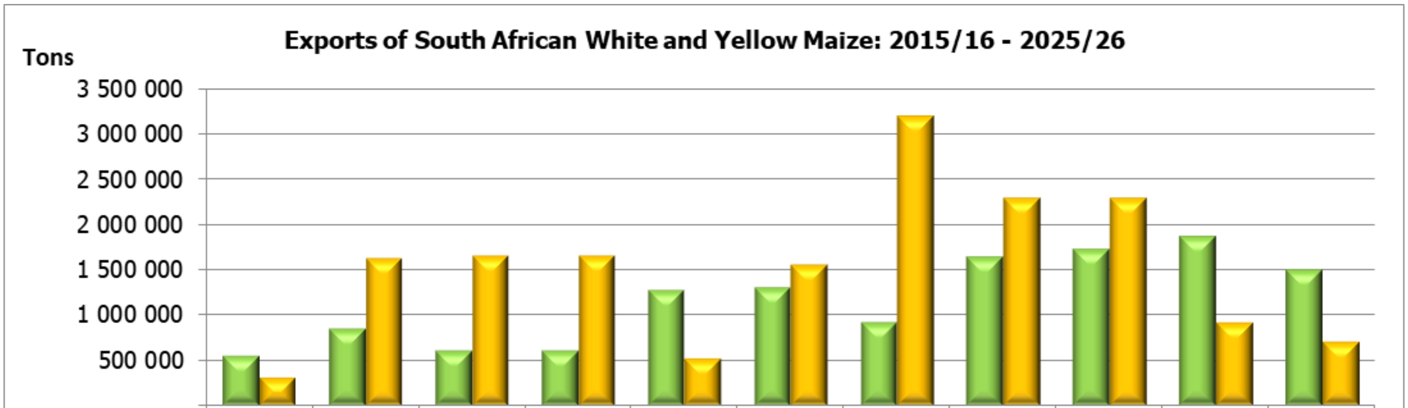
Graph 1: Major countries of wheat imports to South Africa: 2024/25 marketing year



- The progressive wheat imports (human consumption) for the 2024/25 marketing year (28 September 2024 to 28 March 2025) amount to 881 203 tons, with 41,93% or 369 512 tons from Russian Federation, followed by 22,46% or 197 914 tons from Lithuania, 10,47% or 92 220 tons from Poland, 9,50% or 83 685 tons from Latvia, 6,14% or 54 105 tons from Canada, 4,95% or 43 660 tons from Australia and 4,55% or 40 107 tons from Romania. The exports of wheat (human consumption) for the above-mentioned period amount to 78 623 tons, of which 54,19% or 42 606 tons went to Zimbabwe, 17,96% or 14 121 tons went to Botswana, 12,24% or 9 624 tons went to Lesotho, 10,16% or 7 992 tons went to Zambia and 5,44% or 4 280 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



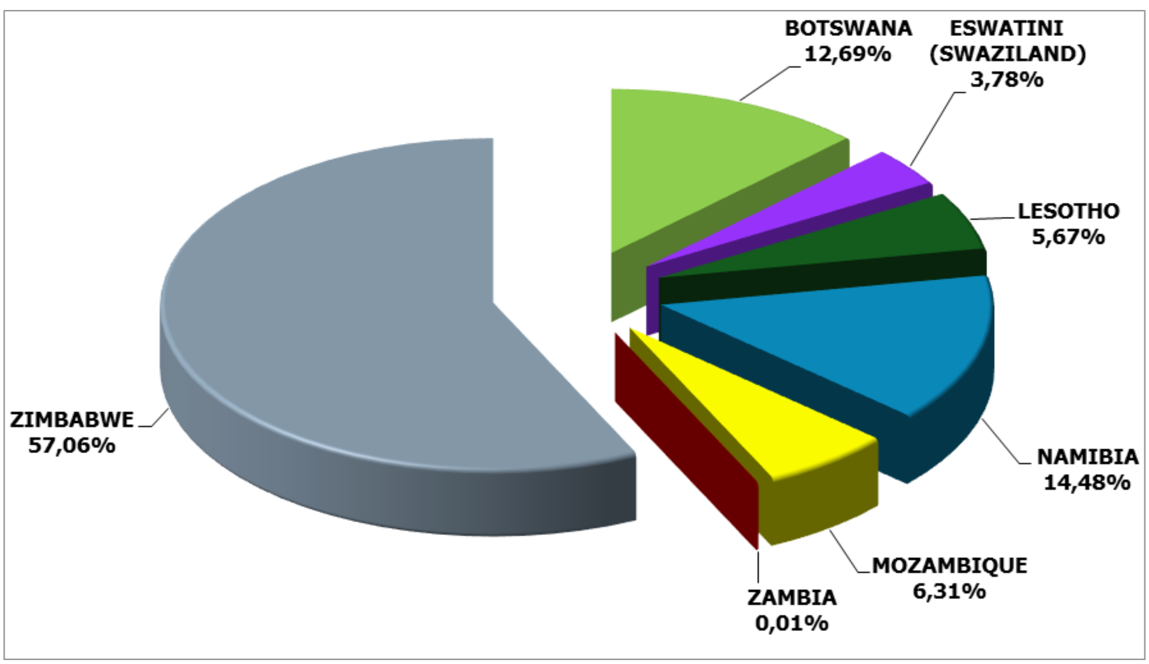
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25*	2025/26*
White maize	557 063	851 969	617 000	616 651	1 275 446	1 304 475	924 434	1 654 525	1 734 933	1 870 000	1 500 000
Yellow maize	322 748	1 629 739	1 666 000	1 667 407	534 127	1 563 315	3 210 777	2 295 281	2 296 110	920 000	720 000

*Projection

- The exports of white maize for the 2024/25 marketing year are projected at 1,870 million tons, which represents an increase of 7,79% or 135 067 tons compared to the 1,735 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 920 000 tons, which represents a decrease of 59,93% or 1,379 million tons compared to the 2,296 million tons of the previous marketing year.

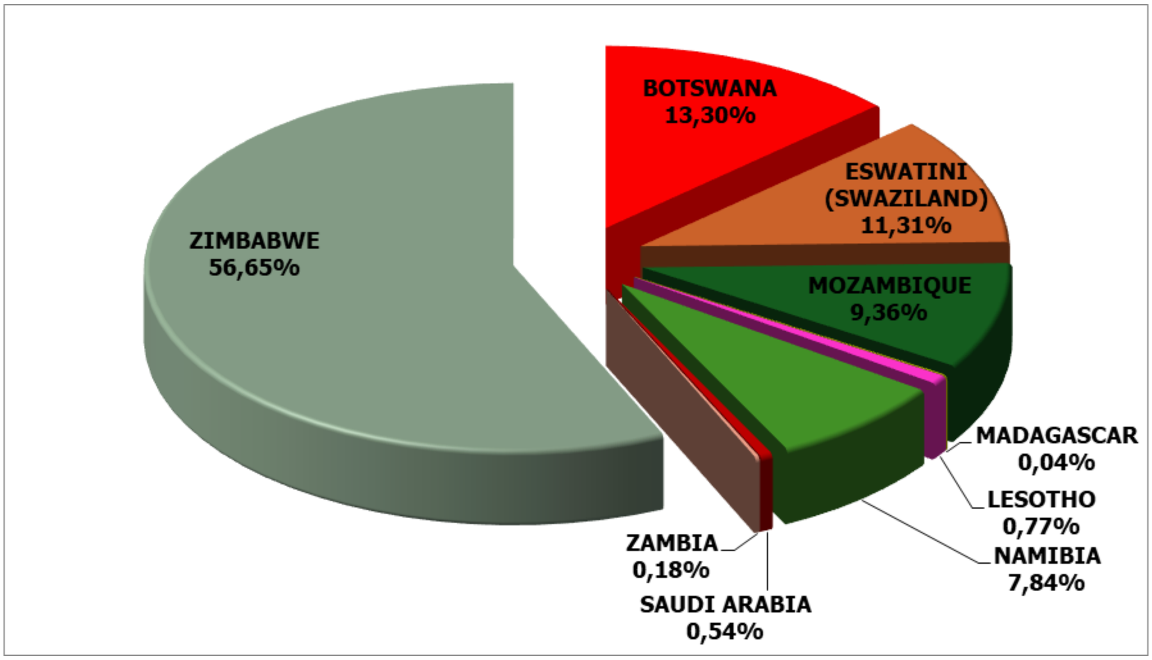
- The exports of white maize for the 2025/26 marketing year are projected at 1,500 million tons, which represents a decrease of 19,79% or 370 000 tons compared to the 1,870 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 720 000 tons, which represents a decrease of 21,74% or 200 000 tons compared to the 920 000 tons of the previous marketing year

Graph 3: Major countries of white maize exports from South Africa: 2024/25 marketing year



- From 27 April 2024 to 28 March 2025, progressive white maize exports for the 2024/25 marketing year amount to 1,393 million tons, with the main destinations being Zimbabwe (57,06% or 795 025tons), followed by Namibia (14,48% or 201 768 tons), Botswana (12,69% or 176 758 tons), Mozambique (6,31% or 87 905 tons), Lesotho (5,67% or 78 963 tons), Eswathini (Swaziland) (3,78% or 52 667 tons) and Zambia (0,01% or 137 tons). The imports of white maize for the mentioned period amount to 89 921 tons, with the main origin being 100% or 89 921 tons from the United States.

Graph 4: Major countries of yellow maize exports from South Africa: 2024/25 marketing year



- From 27 April 2024 to 28 Marchy 2025, progressive yellow maize exports for the 2024/25 marketing year amount to 741 840 tons, with the main destinations being, Zimbabwe (56,65% or 420 223 tons), followed by Botswana (13,30% or 98 695 tons), Eswathini (Swaziland) (11,31% or 83 893 tons), Mozambique (9,36% or 69 468 tons), Namibia (7,84% or 58 138 tons), Lesotho (0,77% or 5 734 tons), Saudi Arabia (0,54% or 4 022 tons), Zambia (0,18% or 1 356 tons) and Madagascar (0,04% or 301 tons). The imports of yellow maize for the mentioned period amount to 762 167 tons, with the main origins being - 84,95% or 647 498 tons from Argentina, 13,87% or 105 707 tons from Brazil and 1,18% or 8 962 tons from the United States.

4. Market information

4.1 Consumer Price Index (CPI)

- Annual consumer price inflation was 3,2% in February 2025, unchanged from January 2025. The CPI increased by 0,9% month-on-month in February 2025.
- The main contributors to the 3,2% annual inflation rate were:
  - Housing and utilities (4,4% and contributing 1,0%);
  - Food and non-alcoholic beverages (2,8% and contributing 0,5%); and
  - Restaurants and accommodation services (4,6% and contributing 0,3%).
- In February 2025, the annual inflation rate for goods was 2,5%, up from 2,4% in January 2025; and services was 3,8%, down from 4,0% in January 2025.

4.2 Producer Price Index (PPI)

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

plastic products (8,7% and contributing 2,5%). The main contributors to the monthly rate were basic and fabricated metals (2,7% and contributing 1,4%) and chemicals, rubber and plastic products (2,1% and contributing 0,6%).

- The annual percentage change in the PPI for electricity and water was 10,8% in February 2025, compared with 10,0% in January 2025. The index increased by 1,4% month-on-month. The contributors to the annual rate were electricity (11,9% and contributing 10,1%) and water (5,6% and contributing 0,8%). The contributor to the monthly rate was electricity (1,7% and contributing 1,5%).
- The annual percentage change in the PPI for mining was 2,5% in February 2025, compared with 0,7% in January 2025. The index increased by 2,0% month-on-month. The main positive contributors to the annual rate were gold and other metal ores (14,4% and contributing 3,9%) and non-ferrous metal ores (2,4% and contributing 1,2%). The positive contributors to the monthly rate were gold and other metal ores (4,5% and contributing 1,3%); non-ferrous metal ores (2,4% and contributing 1,2%); and stone quarrying, clay and diamonds (11,5% and contributing 0,6%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was 7,6% in February 2025, compared with 7,5% in January 2025. The index decreased by 2,3% month-on-month. The main contributor to the annual rate was agriculture (8,3% and contributing 7,2%). The main negative contributor to the monthly rate was agriculture (-2,7% and contributing -2,4%).

4.3 Future contract prices

Table 3: Closing prices on Thursday, 3 April 2025

	3 April 2025	3 March 2025	% Change
RSA White Maize per ton (Apr. 2025 contract)	R5 164,00	R5 080,00	1,65
RSA Yellow Maize per ton (Apr. 2025 contract)	R4 562,00	R4 604,00	-0,91
RSA Wheat per ton (Apr. 2025 contract)	R6 120,00	R6 118,00	0,03
RSA Sunflower seed per ton (Apr. 2025 contract)	R8 794,00	R9 000,00	-2,29
RSA Soya-beans per ton (Apr. 2025 contract)	R7 750,00	R7 807,00	-0,73
Exchange rate R/$	R18,78	R18,65	0,70

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- February 2025 tractor sales of 638 units were approximately 21% more than the 527 units sold in February 2024. Year-to-date tractor sales are now approximately 23% up on last year. Nineteen combine harvesters were sold in February 2025, one more than the 18 units sold in February 2024. On a year-to-date basis, combine harvester sales are now almost 8% down on last year.
- Although the beginning of the summer-cropping season was challenging in terms of suitable planting rains at the beginning of the season, rainfall became more general and widespread from mid-December. Industry sentiment is now more positive and this is reflected in the current levels of improved tractor sales. Current predictions are that tractor sales will be similar, or marginally less, than the 6 463 units sold in 2024. Combine harvester sales of between 180 and 190 units are expected for 2025.

Table 4: Agricultural machinery sales

Equipment class	Year-on-year		Percentage	Year-to-date		Percentage
	February		**Change**	**February**		**Change**
	2025	**2024**	**%**	**2025**	**2024**	**%**
Tractors	638	527	21,06	1 093	885	23,50
Combine harvesters	19	18	5,55	24	26	-7,69

Source: SAAMA press release, March 2025

PLEASE NOTE: The Food Security Bulletin for April 2025 will be released on **9 May 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