MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA MAY 2025

Issued: 6 June 2025

Directorate: Statistics and Economic Analysis

- **According to the latest Seasonal Climate Watch of the South African Weather Service for the period June to October 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 736 038 tons, which includes imports of 1,850 million tons. It is also 1,8% less than the previous years' ending stocks.**
- **The expected commercial maize crop for 2025 is 14,644 million tons, which is 14,0% 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 1,522 million tons, which is 129,4% more than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the current 2025/26 marketing year are 76 487 tons, which is 11,5% less than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2025/26 marketing year are 65 229 tons, which is 10,4% less than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the current 2025/26 marketing year are 219 779 tons, which is 56,2% more than the previous years' ending stocks.**
- **The annual percentage change in the CPI was higher at 2,8% in April 2025.**
- **The annual percentage change in the PPI for final manufactured goods was unchanged at 0,5% in April 2025.**
- **April 2025 tractor sales of 527 units were approximately 5% more than the 500 units sold in April 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 June to October 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 winter and early 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 mid-winter the southwest and eastern coastal areas are expected to receive above-normal rainfall, however during late-winter and early spring only the eastern coastal areas' expected rainfall remains above-normal, with the south-west's outlook changing to below-normal rainfall.

Minimum and maximum temperatures are largely expected to be above-normal for the most parts during the winter season, with the notable exception of the southern coastal areas that are expected to see parts of it be below-normal.

1.2 Level of dams

Available information on the level of South Africa's dams on 2 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 (27%), Free State (16%), Gauteng (13%), Northern Cape Province (10%), KwaZulu-Natal (6%), Limpopo (5%), Mpumalanga (4%) and Eastern Cape Province (1%), all show increases in full supply capacity as compared to 2024. However, the Western Cape Province (-1%) 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, 2 June 2025

Province	Net FSC million cubic meters	**02/06/2025 (%)**	Last Year (2024) (%)	% Increase/Decrease 2025 vs. 2024
Kingdom of Eswatini	334	100	99	1,0
Eastern Cape	1 728	82	81	1,0
Free State	15 657	101	85	16,0
Gauteng	128	102	89	13,0
KwaZulu-Natal	4 910	97	91	6,0
Kingdom of Lesotho	2 363	100	91	9,0
Limpopo	1 485	88	83	5,0
Mpumalanga	2 538	100	96	4,0
Northern Cape	146	87	77	10,0
North West	866	101	74	27,0
Western Cape	1 866	56	57	-1,0
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 fourth production forecast for summer grains for the 2025 season was released by the Crop Estimates Committee (CEC) on 27 May 2025, and is as follows:

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

CROP	**Area planted** **2025** **Ha** **(A)**	4th 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**	**6 995 500**	1 081 500	6 795 000	2,95%
Total Maize	**2 596 700**	**14 643 950**	2 636 250	12 850 000	13,96%
Sunflower seed	**555 700**	**727 800**	529 000	632 000	15,16%
Soybeans	**1 151 000**	**2 330 975**	1 150 500	1 848 000	26,14%
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**	**71 415**	39 550	50 495	41,43%
TOTAL	**4 438 295**	**17 975 620**	4 438 600	15 530 495	15,74%

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 14 643 950 tons, which is 13,96% or 1 793 950 tons more than the 12 850 000 tons of the previous season (2024). The yield for maize is 5,64 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 6 995 500 tons, which is 2,95% or 200 500 tons more than the 6 795 000 tons of last season. The yield for yellow maize is 7,02 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 2 330 975 tons, which is 26,14% or 482 975 tons more than the 1 848 000 tons of the previous season. The expected yield is 2,03 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 71 415 tons, which is 41,43% or 20 920 tons more than the 50 495 tons of the previous season. The expected yield is 1,57 t/ha.

Please note that the area planted and fifth production forecast for summer field crops for 2025 will be released on 27 June 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

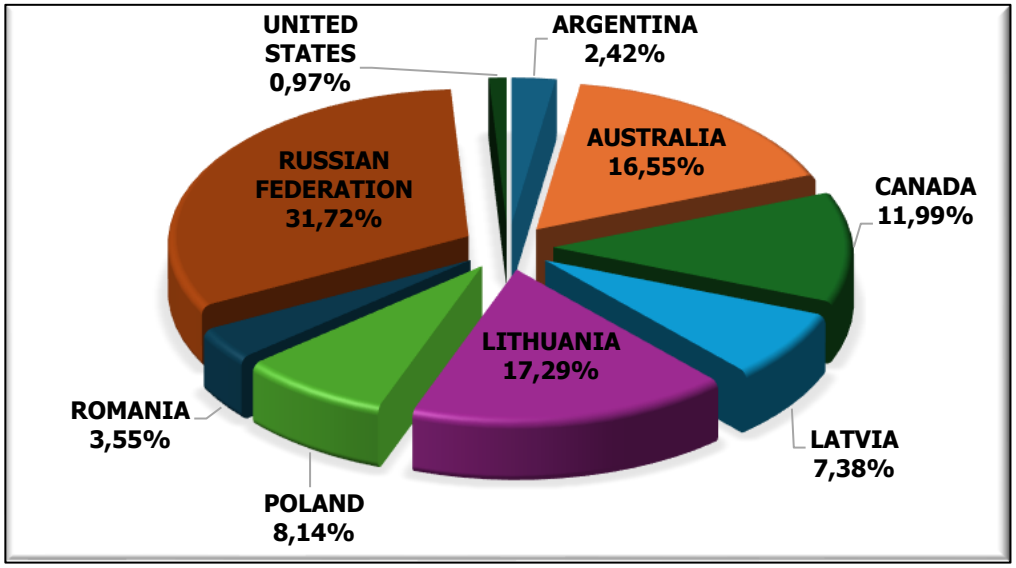
- The area planted to maize in the non-commercial agricultural sector is estimated at 358 000 ha, which represents an increase of 3,17%, compared to the 347 000 ha of the previous season. The expected maize crop for this sector is 621 500 tons, which is 8,09% more than the 575 000 tons of last season. 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 MAY25 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

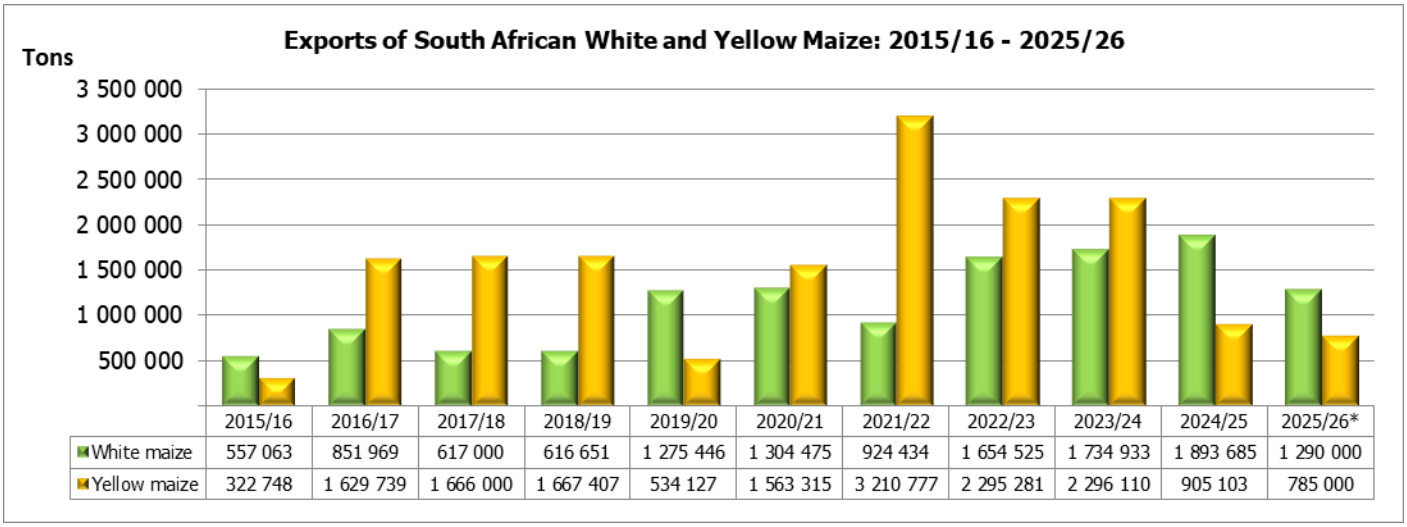


- The progressive wheat imports (human consumption) for the 2024/25 marketing year (28 September 2024 to 30 May 2025) amount to 1 133 692 tons, with 31,72% or 359 606 tons from Russian Federation, followed by 17,29% or 195 978 tons from Lithuania, 16,55% or 187 589 tons from Australia, 11,99% or 135 876 tons from Canada, 8,14% or 92 244 tons from Poland, 7,38% or 83 678 tons from Latvia, 3,55% or 40 288 tons from Romania, 2,42% or 27 433 tons from Argentina and only 0,97% or 11 000 tons from the United States. The

exports of wheat (human consumption) for the above-mentioned period amount to 141 666 tons, of which 39,69% or 56 227 tons went to Zimbabwe, 30,14% or 42 697 tons went to Zambia, 14,10% or 19 968 tons went to Botswana, 11,96% or 16 939 tons went to Lesotho, and only 4,12% or 5 835 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

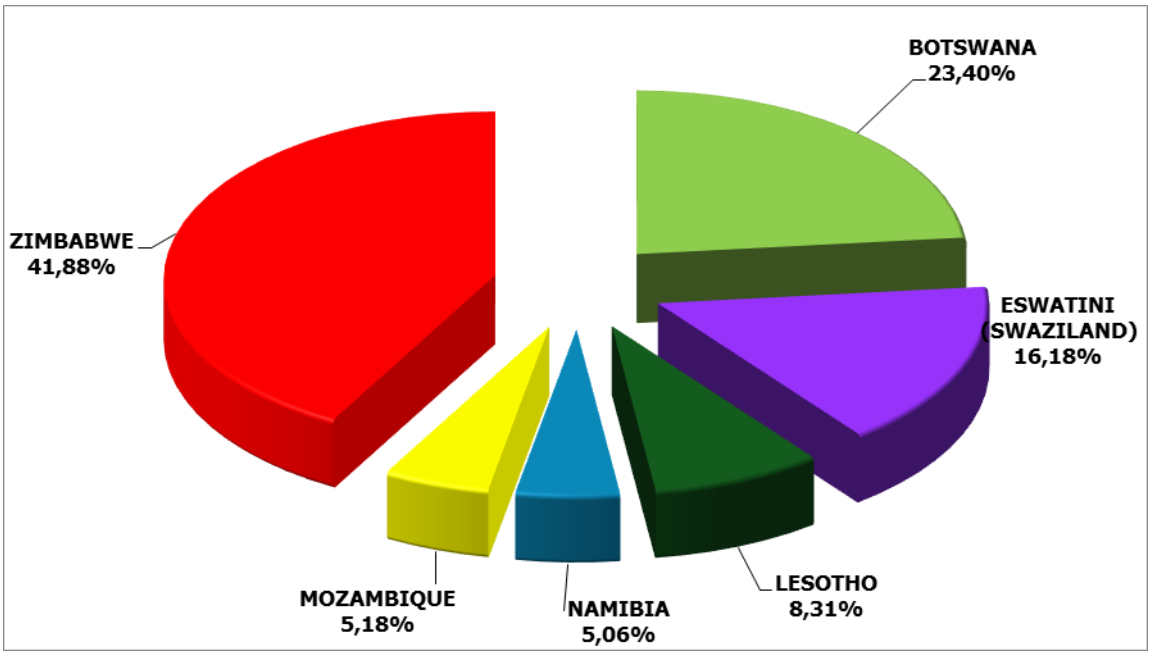


	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26*
White maize	557 063	851 969	617 000	616 651	1 275 446	1 304 475	924 434	1 654 525	1 734 933	1 893 685	1 290 000
Yellow maize	322 748	1 629 739	1 666 000	1 667 407	534 127	1 563 315	3 210 777	2 295 281	2 296 110	905 103	785 000

*Projection

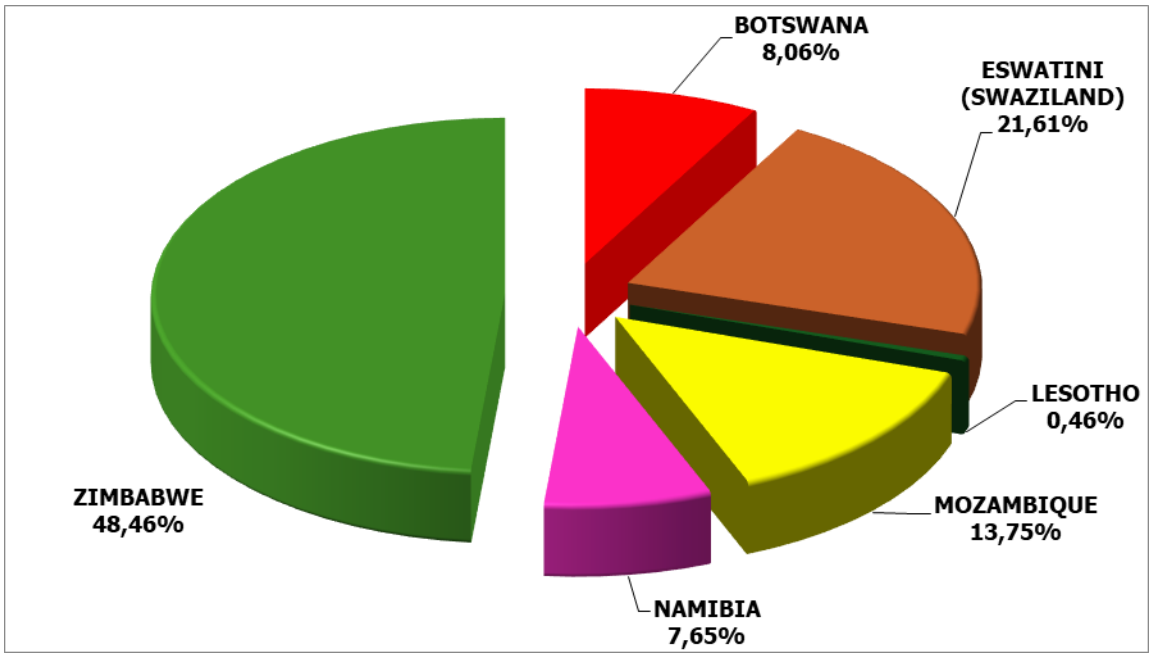
- The exports of white maize for the 2025/26 marketing year are projected at 1,290 million tons, which represents a decrease of 31,88% or 603 685 tons compared to the 1,894 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 785 000 tons, which represents a decrease of 13,27% or 120 103 tons compared to the 905 103 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 30 May 2025, progressive white maize exports for the 2025/26 marketing year amount to 42 333 tons, with the main destinations being Zimbabwe (41,88% or 17 727 tons), followed by Botswana (23,40% or 9 904 tons), Eswathini (Swaziland) (16,18% or 6 851 tons), Lesotho (8,31% or 3 518 tons), Mozambique (5,18% or 2 192 tons) and Namibia (5,06% or 2 141 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 30 May 2025, progressive yellow maize exports for the 2025/26 marketing year amount to 48 688 tons, with the main destinations being, Zimbabwe (48,46% or 23 596 tons), followed by Eswathini (Swaziland) (21,61% or 10 522 tons), Mozambique (13,75% or 6 695 tons), Botswana (8,06% or 3 926 tons), Namibia (7,65% or 3 726 tons) and Lesotho (0,46 or 223 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 April 2025, up from 2,7% in March 2025. The CPI increased by 0,3% month-on-month in April 2025.
- The main positive contributors to the 2,8% annual inflation rate were:
  - housing and utilities (4,4% and contributing 1,0%);
  - food and non-alcoholic beverages (4,0% and contributing 0,7%);
  - alcoholic beverages and tobacco (4,7% and contributing 0,2%); and
  - restaurants and accommodation services (3,0% and contributing 0,2%).
- In April 2025, the annual inflation rate for goods was 1,7%, down from 2,0% in March 2025; and services was 3,8%, up from 3,5% in March 2025.

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 0,5% in April 2025, unchanged from March 2025. The producer price index (PPI) increased by 0,5% month-on-month in April 2025. The main positive contributor to the headline PPI annual inflation rate was food products, beverages and tobacco products (4,7% and contributing 1,4%). The main positive contributor to the monthly rate was food products, beverages and tobacco products (0,9% and contributing 0,3%).
- The annual percentage change in the PPI for intermediate manufactured goods was 8,5% in April 2025, compared with 7,4% in March 2025. The index increased by 2,4% month-on-month. The main contributors to the annual rate were basic and fabricated metals (13,2% and contributing 6,6%) and chemicals, rubber and plastic products (4,2% and contributing 1,2%). The main contributor to the monthly rate was basic and fabricated metals (4,2% and contributing 2,1%)
- The annual percentage change in the PPI for electricity and water was 11,2% in April 2025, compared with 10,0% in March 2025. The index increased by 6,4% month-on-month. The contributors to the annual rate

were electricity (12,5% and contributing 10,7%) and water (4,6% and contributing 0,7%). The contributors to the monthly rate were electricity (7,3% and contributing 6,3%) and water (1,1% and contributing 0,2%).

- The annual percentage change in the PPI for mining was 4,1% in April 2025, compared with 5,9% in March 2025. The index increased by 3,2% month-on-month.
- The positive contributors to the annual rate were:
  - gold and other metal ores (21,7% and contributing 5,8%);
  - non-ferrous metal ores (2,9% and contributing 1,5%); and
  - stone quarrying, clay and diamonds (26,0% and contributing 1,1%).
- The main contributors to the monthly rate were non-ferrous metal ores (3,7% and contributing 1,8%) and gold and other metal ores (4,9% and contributing 1,5%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was 4,4% in April 2025, compared with 2,4% in March 2025. The index increased by 4,5% month-on-month. The main contributor to the annual rate was agriculture (4,7% and contributing 4,1%). The main contributor to the monthly rate was agriculture (4,7% and contributing 4,1%).

4.3 Future contract prices

Table 4: Closing prices on Thursday, 5 June 2025

	5 June 2025	5 May 2025	% Change
RSA White Maize per ton (June 2025 contract)	R4 702,00	R4 312,00	9,04
RSA Yellow Maize per ton (June 2025 contract)	R4 237,00	R4 164,00	1,75
RSA Wheat per ton (June 2025 contract)	R6 385,00	R6 397,00	-0,19
RSA Sunflower seed per ton (June 2025 contract)	R8 910,00	R8 972,00	-0,69
RSA Soya-beans per ton (June 2025 contract)	R7 144,00	R7 581,00	-5,76
Exchange rate R/$	R17,75	R18,29	-2,95

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- April 2025 tractor sales of 527 units were approximately 5% more than the 500 units sold in April 2024. Year-to-date tractor sales are now almost 22% up on last year. Forty-six combine harvesters were sold in April 2025, 20 more than the 26 units sold in April 2024. On a year-to-date basis, combine harvester sales are now approximately 37% up on last year.
- The late rains have caused problems with harvesting of most summer crops. However, market sentiment is still positive, with farmers waiting to see what the yields and quality of their harvests are going to be once they have harvested their crops. This will delay the whole season, going into soil preparation for the forthcoming summer crops. Sales of agricultural machinery are therefore likely to be delayed because of this. Commodity prices are still holding up in most cases.
- Current predictions are that tractor sales will be similar, or marginally more, than the 6 463 units sold last year. Combine harvester sales in 2025 also look as though they are going to be higher than the 201 machines sold last year.

Table 5: Agricultural machinery sales

Equipment class	Year-on-year		Percentage	Year-to-date		Percentage
	April		**Change**	**April**		**Change**
	2025	**2024**	**%**	**2025**	**2024**	**%**
Tractors	527	500	5,40	2 291	1 883	21,67
Combine harvesters	46	26	76,92	107	78	37,18

Source: SAAMA press release, May 2025

PLEASE NOTE: The Food Security Bulletin for June 2025 will be released on **4 July 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