MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA NOVEMBER 2025

Issued: 10 December 2025

Directorate: Statistics and Economic Analysis

- **During November 2025, significant rainfall events were limited to the central and eastern parts of the country.**
- **The expected commercial wheat crop for 2025 is 2,029 million tons, which is 5,1% more than the 1,930 million tons of the previous season (2024).**
- **The projected closing stocks of wheat for the 2025/26 marketing year are 541 074 tons, which includes imports of 1,740 million tons. It is also 16,9% less than the previous years' ending stocks.**
- **The expected commercial maize crop for 2025 is 16,436 million tons, which is 27,9% 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 2,420 million tons, which is 270,2% more than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the current 2025/26 marketing year are 76 302 tons, which is 11,7% less than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2025/26 marketing year are 46 659 tons, which is 35,9% less than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the current 2025/26 marketing year are 417 449 tons, which is 196,7% more than the previous years' ending stocks.**
- **The annual percentage change in the CPI was higher at 3,6% in October 2025.**
- **The annual percentage change in the PPI for final manufactured goods was higher at 2,9% in October 2025.**
- **November 2025 tractor sales of 544 units were 4% more than the 523 units sold in November 2024.**

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1. Weather conditions

1.1 Rainfall for November 2025

During November 2025, significant rainfall events were limited to the central and eastern parts of the country (**Figure 1**). Comparing rainfall totals to the long-term average for November 2025, rainfall received was above-normal, mainly over isolated areas of the Free State, the northern and south-eastern parts of the Northern Cape, the North West and south-western parts of Limpopo (**Figure 2**). The remainder of the country received normal to below-normal rainfall.

. (Source: Directorate: Climate Change and Disaster Management of Department: Agriculture).

Figure 1: Rainfall (mm) for November 2025

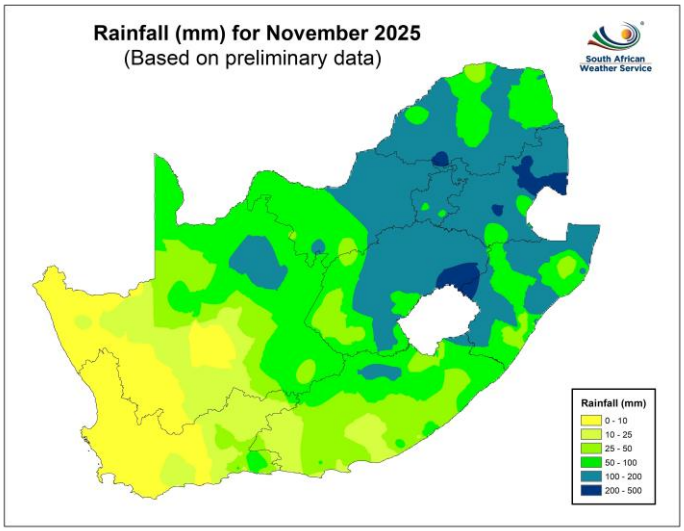
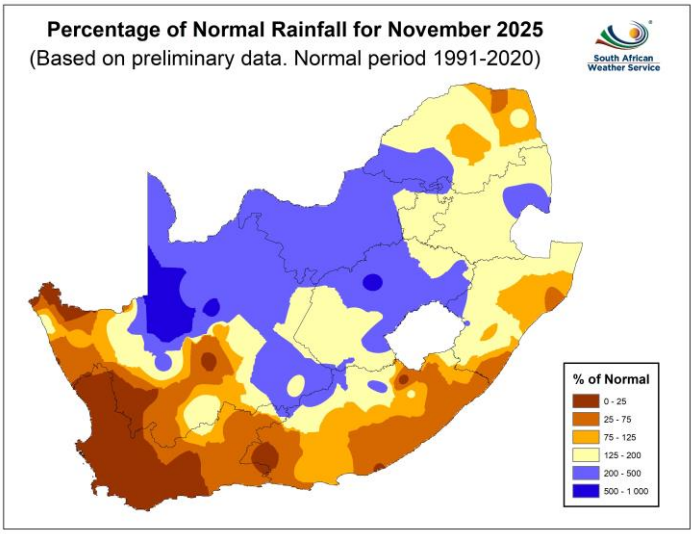


Figure 2: Percentage rainfall for November 2025



1.2 Level of dams

Available information on the level of South Africa's dams on 8 December 2025 indicates that the country has approximately 94% of its full supply capacity (FSC) available, which is 19,0% more as compared to the corresponding period in 2024. The North West Province (40%), Northern Cape (30%), Free State (28%), Mpumalanga (23%), Gauteng (20%), KwaZulu-Natal (11%), and Limpopo (16%) all show increases in the full supply capacity as compared to 2024. However, the Western Cape (-21%) and Eastern Cape Province (-9%), show 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, 8 December 2025

Province	Net FSC million cubic meters	**08/12/2025 (%)**	Last Year (2024) (%)	% Increase/Decrease 2025 vs. 2024
Eastern Cape	1 728	75	84	-9,0
Free State	15 657	100	72	28,0
Gauteng	128	103	83	20,0
Kindom of Lesotho	2 363	101	81	20,0
Kingdom of Eswatini	334	101	66	35,0
Kwazulu-Natal	4 910	90	79	11,0
Limpopo	1 485	84	68	16,0
Mpumalanga	2 538	99	76	23,0
North West	866	95	55	40,0
Northern Cape	146	101	71	30,0
Western Cape	1 866	69	90	-21,0
Total	32 021	**94**	**75**	19,0

Source: Department of Water and Sanitation

2. Grain production

2.1 Summer grain crops - 2025

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

Table 2: Commercial summer grains: Area planted and final production estimate - 2025 season

CROP	Area planted 2025 Ha (A)	**Final estimate 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	**8 378 250**	1 554 750	6 055 000	38,37%
Yellow maize	997 000	**8 057 400**	1 081 500	6 795 000	18,58%
Total Maize	2 596 700	**16 435 650**	2 636 250	12 850 000	27,90%
Sunflower seed	555 700	**708 300**	529 000	632 000	12,07%
Soybeans	1 151 000	**2 771 225**	1 150 500	1 848 000	49,96%
Groundnuts	48 125	**62 474**	41 200	52 000	20,14%
Sorghum	41 150	**146 605**	42 100	98 000	49,60%
Dry beans	45 620	**90 556**	39 550	50 495	79,34%
TOTAL	4 438 295	**20 214 810**	4 438 600	15 530 495	30,16%

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 16 435 650 tons, which is 27,90% or 3 585 650 tons more than the 12 850 000 tons of the previous season (2024). The yield for maize is 6,33 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 8 378 250 tons, which is 38,37% or 2 323 250 tons more than the 6 055 000 tons of last season. The yield for white maize is 5,24 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 8 057 400 tons, which is 18,58% or 1 262 400 tons more than the 6 795 000 tons of last season. The yield for yellow maize is 8,08 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 2 771 225 tons, which is 49,96% or 923 225 tons more than the 1 848 000 tons of the previous season. The expected yield is 2,41 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 62 474 tons – which is 20,14% or 10 474 tons more than the 52 000 tons of last season. The expected yield is 1,30 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 146 605 tons, which is 49,60% or 48 605 tons more than the 98 000 tons of the previous season. The expected yield is 3,56 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 90 556 tons, which is 79,34% or 40 061 tons more than the 50 495 tons of the previous season. The expected yield is 1,99 t/ha.

Please note that the preliminary area planted estimate for summer field crops for 2026 will be released on 27 January 2026.

2.2 Winter cereal crops – 2025

The CEC also released area planted estimate and fourth production forecast for winter cereals for 2025 on 27 November 2025.

Table 3: Winter cereals: Area planted estimate and fourth production forecast - 2025 season

CROP	Area planted 2025 Ha (A)	4th forecast 2025 Tons (B)	Area planted 2024 Ha (C)	Final crop 2024 Tons (D)	Change % (B) ÷ (D)
Commercial[1]:					
Wheat	**517 300**	**2 028 680**	505 300	1 930 000	5,11%
Barley	**96 950**	**341 770**	100 700	372 250	-8,19%
Canola	**174 515**	**311 850**	165 750	290 400	7,39%
Oats	**35 520**	**53 813**	31 000	43 400	23,99%
Sweet lupines	**21 000**	**21 000**	16 000	19 200	9,38%
Total winter	**845 285**	**2 757 113**	818 750	2 655 250	3,84%

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

- The expected production of **wheat** is 2 028 680 tons, which is 5,11% or 98 680 tons more than the previous seasons' crop of 1 930 000 tons, whilst the expected yield is 3,92 t/ha.
- The area estimate for wheat is to 517 300 ha, with an estimated 363 000 ha or 70% is planted in the Western Cape, 57 000 ha or 11% in the Free State and 40 000 ha or 8% in the Northern Cape.
- The production forecast for **barley** is 341 770 tons, which is 8,19% or 30 480 tons less than the previous seasons' crop of 372 250 tons. The area planted is estimated at 96 950 ha, while the expected yield is 3,53 t/ha.
- The expected **canola crop** is 311 890 tons, which is 7,39% or 21 450 tons more than the previous seasons' crop of 290 400 tons. This is the largest canola crop on record. The area estimate for canola is 174 515 ha, with an expected yield of 1,79 t/ha.
- The expected crop for **oats** for the 2025 season is 53 813 tons and the area planted is 35 520 ha. The expected yield is 1,52 t/ha.
- In the case of **sweet lupines,** the production forecast is 21 000 tons. The area estimate of sweet lupines is 21 000 ha, with an expected yield of 1,00 t/ha.

Please note that the area planted estimate and fifth production forecast for winter cereals for 2025 will be released on 18 December 2025.

2.3 Non-commercial maize - 2025

The CEC 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

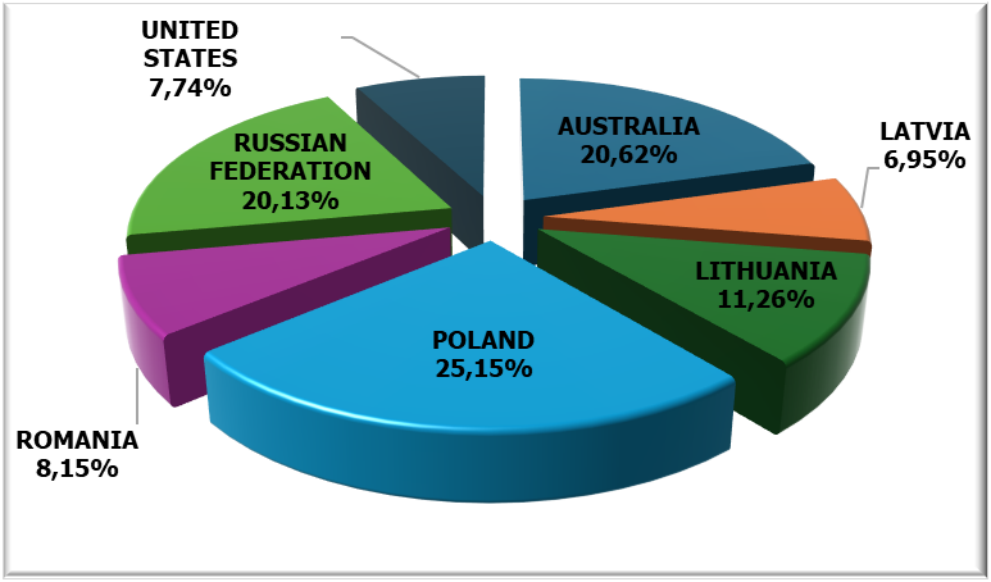
- The area planted to maize in the non-commercial agricultural sector is estimated at 358 000 ha, which represents an increase of 3,17%, compared to the 347 000 ha of the previous season. The expected maize crop for this sector is 621 500 tons, which is 8,09% more than the 575 000 tons of last season. 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 NOV25 Annexure A.

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

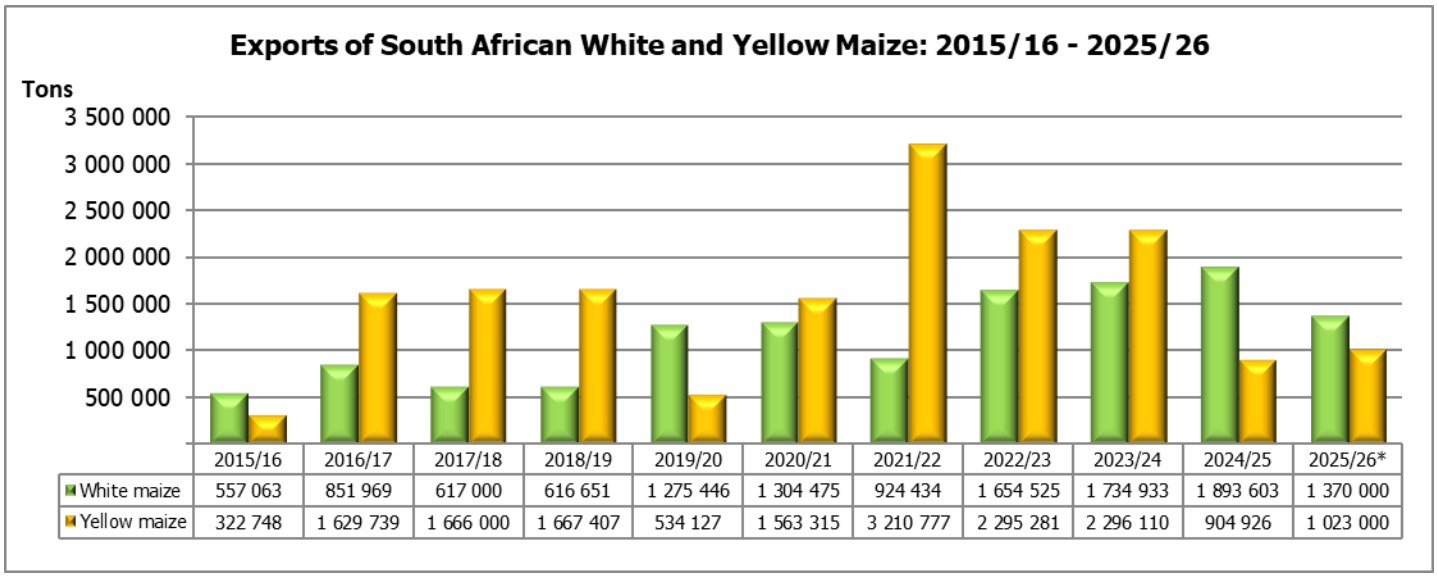
Graph 1: Major countries of wheat imports to South Africa: 2025/26 marketing year



The progressive wheat imports (human consumption) for the 2025/26 marketing year (27 September to 28 November 2025) amount to 429 625 tons, with 25,15% or 108 070 tons from Poland, followed by 20,62% or 88 578 tons from Australia, 20,13% or 86 491 tons from Russian Federation, 11,26% or 48 386 tons from Lithuania, 8,15% or 34 999 tons from Romania, 7,74% or 33 244 tons from the United States and 6,95% or 29 857 tons from Latvia. The exports of wheat (human consumption) for the above-mentioned period amount to 6 036 tons, of which 45,38% or 2 739 tons went to Lesotho, 38,98% or 2 353 tons went to Zimbabwe, 9,01% or 544 tons went to Botswana, 4,79% or 289 tons went to Zambia and only 1,84% or 111 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

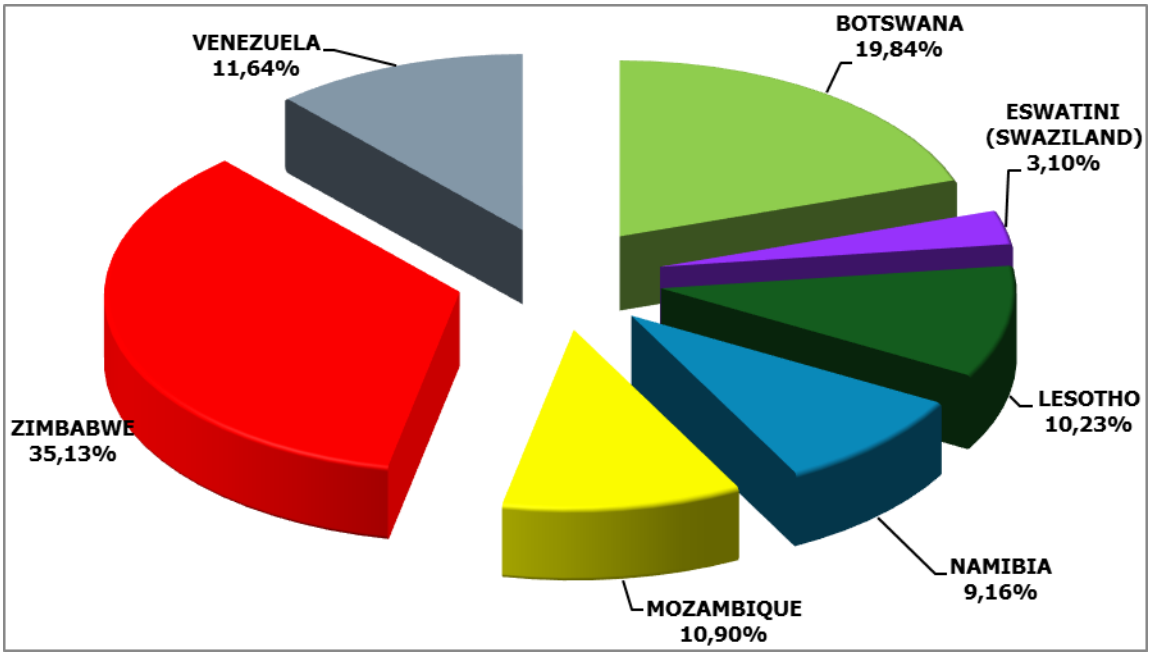


	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26*
White maize	557 063	851 969	617 000	616 651	1 275 446	1 304 475	924 434	1 654 525	1 734 933	1 893 603	1 370 000
Yellow maize	322 748	1 629 739	1 666 000	1 667 407	534 127	1 563 315	3 210 777	2 295 281	2 296 110	904 926	1 023 000

*Projection

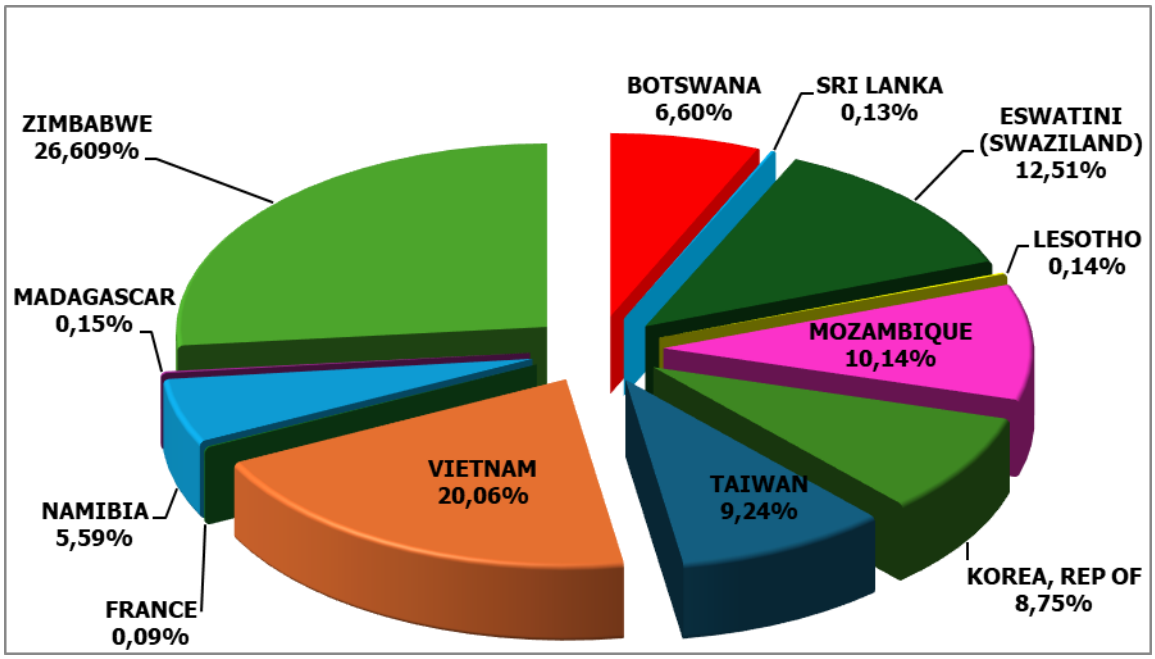
- The exports of white maize for the 2025/26 marketing year are projected at 1,370 million tons, which represents a decrease of 27,65% or 523 603 tons compared to the 1,894 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 1,023 million tons, which represents an increase of 13,05% or 118 074 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 28 November 2025, progressive white maize exports for the 2025/26 marketing year amount to 567 068 tons, with the main destinations being Zimbabwe (35,13% or 199 214 tons), followed by Botswana (19,84% or 112 531 tons), Venezuela (11,64% or 66 001 tons), Mozambique (10,90% or 61 814 tons), Lesotho (10,23% or 57 985 tons), Namibia (9,16% or 51 917 tons) and Eswathini (Swaziland) (3,10% or 17 606 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 28 November 2025, progressive yellow maize exports for the 2025/26 marketing year amount to 544 068 tons, with the main destinations being, Zimbabwe (26,61% or 144 772 tons), followed by Vietnam (20,06% or 109 120 tons), Eswathini (Swaziland) (12,51% or 68 072 tons), Mozambique (10,14% or 55 185 tons), Taiwan (9,24% or 50 255 tons), Republic of Korea (8,75% or 47 633 tons), Botswana (6,60% or 35 888 tons), Namibia (5,59% or 30 416 tons), Madagascar (0,15% or 796 tons), Lesotho (0,14% or 738 tons), Sri Lanka (0,13% or 713 tons) and France (0,09% or 480 tons). The imports of yellow maize for the mentioned period 77 524 tons, 100% from Argentina.

4. Market information

4.1 Consumer Price Index (CPI)

- Annual consumer price inflation was 3,6% in October 2025, up from 3,4% in September 2025. The CPI increased by 0,1% month-on-month in October 2025.
- The main contributors to the 3,6% annual inflation rate were:
  - Housing and utilities (4,5% and contributing 1,1%) and
  - Food and non-alcoholic beverages (3,9% and contributing 0,7%).
- In October 2025, the annual inflation rate for goods was 3,1%, up from 2,9% in September 2025; and services was 4,0%, up from 3,9% in September 2025.

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 2,9% in October 2025, compared with 2,3% in September 2025. The producer price index (PPI) decreased by 0,1% month-on-month in October 2025.
- The main positive contributors to the headline PPI annual inflation rate were:
  - Food products, beverages and tobacco products (3,1% and contributing 0,9%);
  - Coke, petroleum, chemical, rubber and plastic products (2,5% and contributing 0,5%); and
  - Furniture and other manufacturing (11,2% and contributing 0,5%).
- The main negative contributors to the monthly rate were food products, beverages and tobacco products (-0,3% and contributing -0,1%); coke, petroleum, chemical, rubber and plastic products (-0,4% and contributing -0,1%); and electrical machinery and communication and metering equipment (-2,0% and contributing -0,1%).

- The annual percentage change in the PPI for intermediate manufactured goods was 10,9% in October 2025, compared with 7,6% in September 2025. The index increased by 2,7% month-on-month. The main positive contributors to the annual rate were basic and fabricated metals (21,2% and contributing 10,6%) and sawmilling and wood (8,7% and contributing 0,9%). The main positive contributors to the monthly rate were basic and fabricated metals (3,7% and contributing 2,0%) and sawmilling and wood (5,6% and contributing 0,6%).
- The annual percentage change in the PPI for electricity and water was 16,1% in October 2025, compared with 14,9% in September 2025. The index increased by 0,2% month-on-month. The contributors to the annual rate were electricity (16,8% and contributing 14,5%) and water (11,6% and contributing 1,6%). The main contributor to the monthly rate was electricity (0,3% and contributing 0,3%).
- The annual percentage change in the PPI for mining was 18,4% in October 2025, compared with 16,0% in September 2025. The index increased by 3,3% month-on-month.
- The positive contributors to the annual rate were:
  - non-ferrous metal ores (27,5% and contributing 13,8%);
  - gold and other metal ores (30,6% and contributing 8,4%); and
  - stone quarrying, clay and diamonds (13,1% and contributing 0,6%).
- The positive contributors to the monthly rate were non-ferrous metal ores (5,8% and contributing 3,1%) and gold and other metal ores (5,4% and contributing 1,6%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was -1,8% in October 2025, compared with -1,1% in September 2025. The index increased by 2,3% month-on-month. The main negative contributor to the annual rate was agriculture (-3,0% and contributing -2,6%). The main positive contributor to the monthly rate was agriculture (2,5% and contributing 2,1%).

4.3 Future contract prices

Table 5: Closing prices on Wednesday, 10 December 2025

	10 December 2025	10 November 2025	% Change
RSA White Maize per ton (Dec. 2025 contract)	R3 670,00	R3 608,00	1,72
RSA Yellow Maize per ton (Dec. 2025 contract)	R3 628,00	R3 509,00	3,39
RSA Wheat per ton (Dec. 2025 contract)	R5 800,00	R5 835,00	-0,60
RSA Sunflower seed per ton (Dec. 2025 contract)	R10 640,00	R10 170,00	4,62
RSA Soya-beans per ton (Dec. 2025 contract)	R6 760,00	R7 276,00	-7,09
Exchange rate R/$	R17,02	R17,20	-1,05

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- November 2025 tractor sales of 544 units were 4% more than the 523 units sold in November 2024. Year-to-date tractor sales are now 19% up on last year. Three combine harvesters were sold in November 2025, ten less than the 13 units sold in November 2024. On a year-to-date basis, however, combine harvester sales are now approximately 3% up on last year.
- Overall market conditions proved to be quite challenging in November. General rains meant that some farmers were not able to complete their planting, particularly in the east of the country. However, in the west planting continues, where possible. Most farmers are now hoping for some sunny, warm weather. Commodity prices have eased due to good international crop prospects.
- Tractor sales look as though they will end up between 15 and 20% up on last year. Combine harvester sales will be marginally (5%) up on last year. At this early stage, expectations are that tractor and combine harvester sales next year will be at levels similar to this year.

Table 6: Agricultural machinery sales

Equipment class	Year-on-year		Percentage	Year-to-date		Percentage
	November		**Change**	**November**		**Change**
	2025	**2024**	**%**	**2025**	**2024**	**%**
Tractors	544	523	4,02	7 174	6 019	19,19
Combine harvesters	3	13	-76,92	200	195	2,56

Source: SAAMA press release, December 2025

PLEASE NOTE: The Food Security Bulletin for December 2025 will be released on **16 January 2026**.

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