

MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA OCTOBER 2025

Issued: 7 November 2025

Directorate: Statistics and Economic Analysis

- During October 2025, significant rainfall events were limited to the eastern, central and north-western parts of the country.
- The expected commercial wheat crop for 2025 is 2,034 million tons, which is 5,4% 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 560 651 tons, which includes imports of 1,740 million tons. It is also 14,2% less than the previous years' ending stocks.
- The expected commercial maize crop for 2025 is 16,324 million tons, which is 27,0% 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 2,394 million tons, which is 266,2% more than the previous years' ending stocks.
- The projected closing stocks of sorghum for the current 2025/26 marketing year are 76 582 tons, which is 11,4% less than the previous years' ending stocks.
- The projected closing stocks of sunflower seed for the current 2025/26 marketing year are 50 079 tons, which is 31,2% less than the previous years' ending stocks.
- The projected closing stocks of soybeans for the current 2025/26 marketing year are 404 629 tons, which is 187,6% more than the previous years' ending stocks.
- The annual percentage change in the CPI was higher at 3,4% in September 2025.
- The annual percentage change in the PPI for final manufactured goods was higher at 2,3% in September 2025.
- October 2025 tractor sales of 857 units were almost 12% more than the 765 units sold in October 2024.



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1. Weather conditions

1.1 Rainfall for October 2025

During October 2025, significant rainfall events were limited to the eastern, central and north-western parts of the country (**Figure 1**). Comparing rainfall totals to the long-term average for October 2025, rainfall received was above-normal over the central parts of the Free State, the northern areas of the Northern Cape, the western parts of North West and the north-eastern regions of the country. The remaining parts of the country received mainly below-normal rainfall (**Figure 2**). (Source: Directorate: Climate Change and Disaster Management of Department: Agriculture).

Figure 1: Rainfall (mm) for October 2025

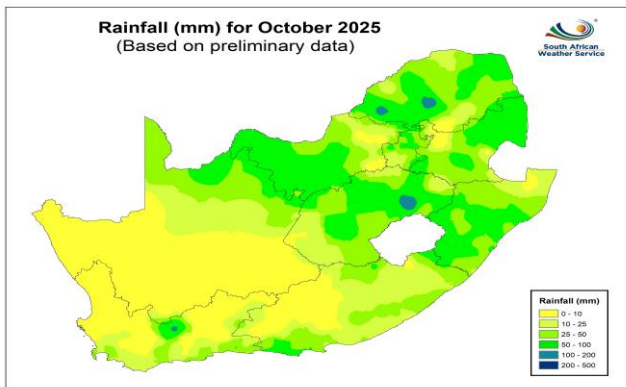
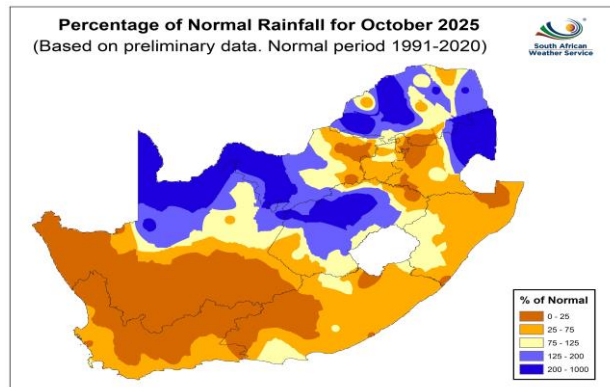


Figure 2: Percentage rainfall for October 2025



1.2 Level of dams

Available information on the level of South Africa’s dams on 3 November 2025 indicates that the country has approximately 92% of its full supply capacity (FSC) available, which is 15,0% more as compared to the corresponding period in 2024. The North West Province (32%), Free State (22%), Gauteng (16%), Mpumalanga (14%), KwaZulu-Natal (13%), Northern Cape (12%), and Limpopo (10%) all show increases in the full supply capacity as compared to 2024. However, the Western Cape (-16%) and Eastern Cape Province (-5%), 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, 3 November 2025

Province	Net FSC million cubic meters	03/11/2025 (%)	Last Year (2024) (%)	% Increase/Decrease 2025 vs. 2024
Eastern Cape	1 728	76	81	-5,0
Free State	15 657	96	74	22,0
Gauteng	128	101	85	16,0
Kindom of Lesotho	2 363	95	79	16,0
Kingdom of Eswatini	334	87	74	13,0
Kwazulu-Natal	4 910	92	79	13,0
Limpopo	1 485	80	70	10,0
Mpumalanga	2 538	93	79	14,0
North West	866	89	57	32,0
Northern Cape	146	86	74	12,0
Western Cape	1 866	79	95	-16,0
Total	32 021	92	77	15,0

Source: Department of Water and Sanitation

2. Grain production

2.1 Summer grain crops - 2025

The area planted and ninth production forecast for summer grains for the 2025 season was released by the Crop Estimates Committee (CEC) on 28 October 2025, and is as follows:

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

CROP	Area planted	9th Forecast 2025	Area planted	Final estimate	Change 2025 vs 2024
	2025 Ha (A)	Tons (B)	2024 Ha (C)	2024 Tons (D)	% (B) ÷ (D)
Commercial:					
White maize	1 599 700	8 335 750	1 554 750	6 055 000	37,67%
Yellow maize	997 000	7 988 800	1 081 500	6 795 000	17,57%
Total Maize	2 596 700	16 324 550	2 636 250	12 850 000	27,04%
Sunflower seed	555 700	708 300	529 000	632 000	12,07%
Soybeans	1 151 000	2 753 125	1 150 500	1 848 000	48,98%
Groundnuts	48 125	61 389	41 200	52 000	18,06%
Sorghum	41 150	144 665	42 100	98 000	47,62%
Dry beans	45 620	90 556	39 550	50 495	79,34%
TOTAL	4 438 295	20 082 585	4 438 600	15 530 495	29,31%

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 16 324 550 tons, which is 27,04% or 3 474 550 tons more than the 12 850 000 tons of the previous season (2024). The yield for maize is 6,29 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 8 335 750 tons, which is 37,67% or 2 280 750 tons more than the 6 055 000 tons of last season. The yield for white maize is 5,21 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 7 988 800 tons, which is 17,57% or 1 193 800 tons more than the 6 795 000 tons of last season. The yield for yellow maize is 8,01 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 2 753 125 tons, which is 48,98% or 905 125 tons more than the 1 848 000 tons of the previous season. The expected yield is 2,39 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 61 389 tons – which is 18,06% or 9 389 tons more than the 52 000 tons of last season. The expected yield is 1,28 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 144 665 tons, which is 47,62% or 46 665 tons more than the 98 000 tons of the previous season. The expected yield is 3,52 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 area planted and final production estimate for summer field crops for 2025 will be released on 27 November 2025.

2.2 Winter cereal crops – 2025

The CEC also released area planted estimate and third production forecast for winter cereals for 2025 on 28 October 2025.

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

CROP	Area planted 2025	3 rd forecast 2025	Area planted 2024	Final crop 2024	Change
	Ha (A)	Tons (B)	Ha (C)	Tons (D)	% (B) ÷ (D)
Commercial¹⁾:					
Wheat	517 300	2 034 380	505 300	1 930 000	5,41%
Barley	96 950	346 430	100 700	372 250	-6,94%
Canola	174 515	311 890	165 750	290 400	7,40%
Oats	35 520	57 213	31 000	43 400	31,83%
Sweet lupines	21 000	21 000	16 000	19 200	9,38%
Total winter	845 285	2 770 913	818 750	2 655 250	4,36%

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 2 034 380 tons, which is 5,41% or 104 380 tons more than the previous seasons' crop of 1 930 000 tons, whilst the expected yield is 3,93 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 346 430 tons, which is 6,94% or 25 820 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 3,57 t/ha.
- The expected **canola crop** is 311 890 tons, which is 7,40% or 21 490 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 57 213 tons and the area planted is 35 520 ha. The expected yield is 1,61 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 fourth production forecast for winter cereals for 2025 will be released on 27 November 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 2024

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

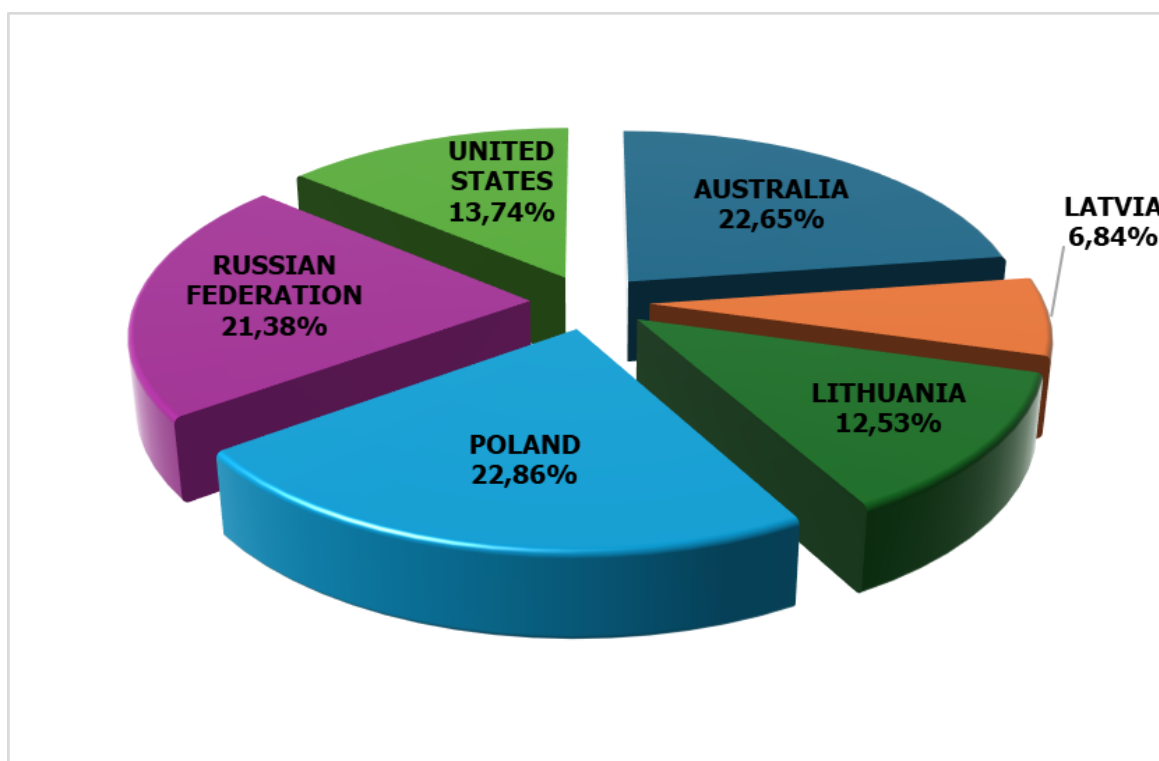
- The area planted to maize in the non-commercial agricultural sector is estimated at 358 000 ha, which represents an increase of 3,17%, compared to the 347 000 ha of the previous season. The expected maize crop for this sector is 621 500 tons, which is 8,09% more than the 575 000 tons of last season. 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 OCT25 Annexure A.

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

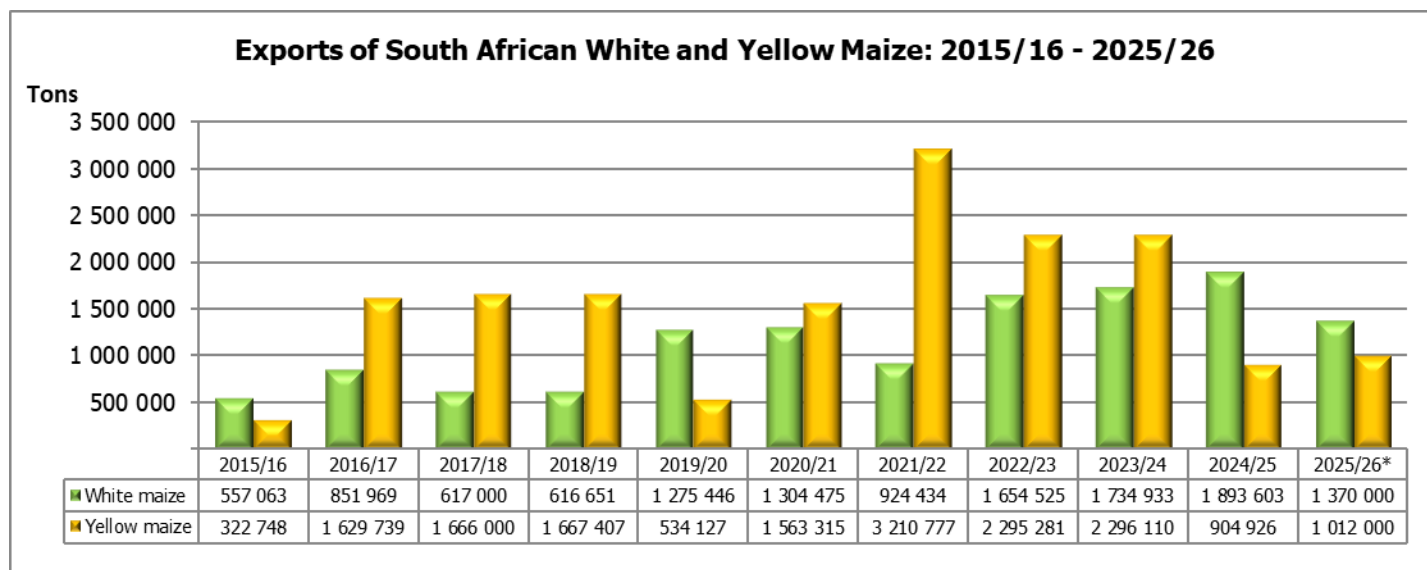
Graph 1: Major countries of wheat imports to South Africa: 2025/26 marketing year



The progressive wheat imports (human consumption) for the 2025/26 marketing year (27 September to 31 October 2025) amount to 241 754 tons, with 22,86% or 55 262 tons from Poland, followed by 22,65% or 54 767 tons from Australia, 21,38% or 51 691 tons from Russian Federation, 13,74% or 33 217 tons from the United States, 12,53% or 30 288 tons from Lithuania and 6,84% or 16 529 tons from Latvia. The exports of wheat (human consumption) for the above-mentioned period amount to 6 128 tons, of which 40,21% or 2 464 tons went to Zimbabwe, 36,03% or 2 208 tons went to Lesotho, 17,46% or 1 070 tons went to Zambia and 6,30% or 386 tons went to Botswana.

3.2 Exports of South African white and yellow maize

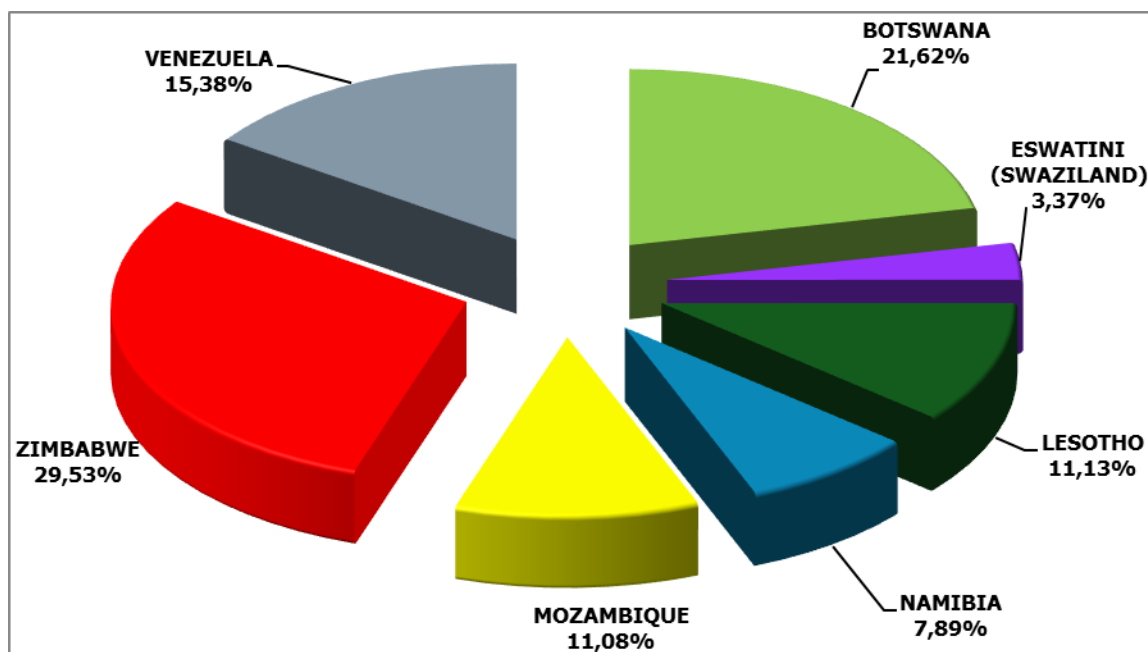
Graph 2: Exports of South African white and yellow maize: 2015/16 - 2025/26 marketing year



*Projection

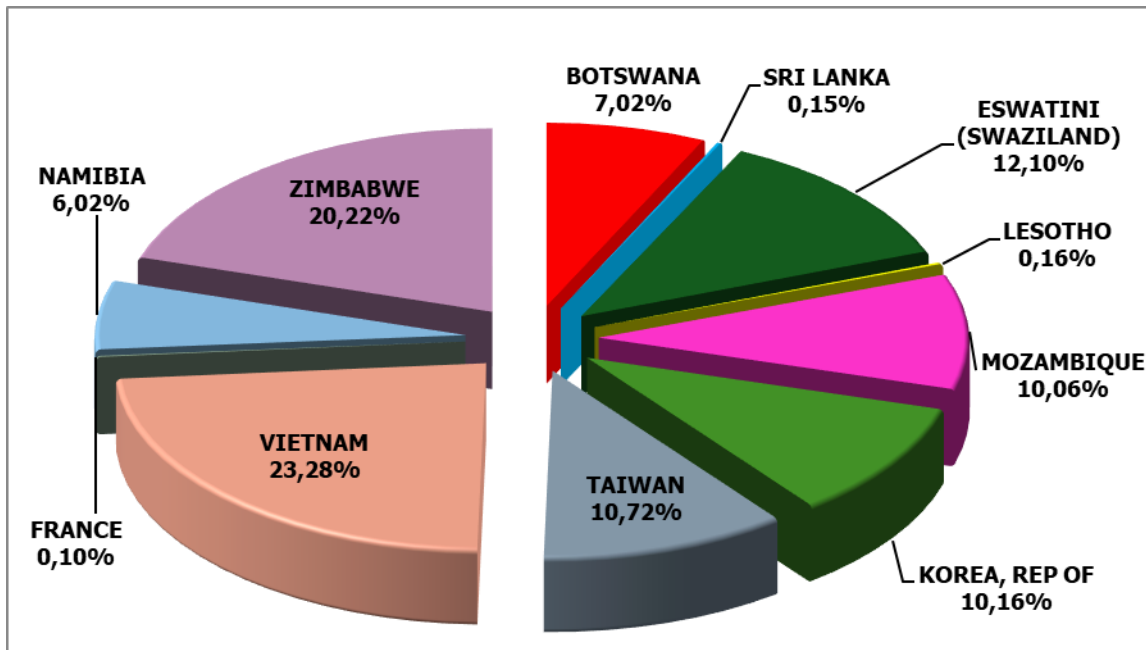
- The exports of white maize for the 2025/26 marketing year are projected at 1,370 million tons, which represents a decrease of 27,65% or 523 603 tons compared to the 1,894 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 1,012 million tons, which represents an increase of 11,83% or 107 074 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 31 October 2025, progressive white maize exports for the 2025/26 marketing year amount to 429 214 tons, with the main destinations being Zimbabwe (29,53% or 126 749 tons), followed by Botswana (21,62% or 92 785 tons), Venezuela (15,38% or 66 001 tons), Lesotho (11,13% or 47 792 tons), Mozambique (11,08% or 47 537 tons), Namibia (7,89% or 33 884 tons) and Eswathini (Swaziland) (3,37% or 14 466 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 31 October 2025, progressive yellow maize exports for the 2025/26 marketing year amount to 468 677 tons, with the main destinations being, Vietnam (23,28% or 109 120 tons), followed by Zimbabwe (20,22% or 94 763 tons), Eswathini (Swaziland) (12,10% or 56 700 tons), Taiwan (10,72% or 50 255 tons), Republic of Korea (10,16% or 47 633 tons), Mozambique (10,06% or 47 156 tons), Botswana (7,02% or 32 913 tons), Namibia (6,02% or 28 208 tons), Lesotho (0,16% or 736 tons), Sri Lanka (0,15% or 713 tons) and France (0,10% 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 3,4% in September 2025, up from 3,3% in August 2025. The CPI increased by 0,2% month-on-month in September 2025.
- The main contributors to the 3,4% annual inflation rate were:
 - Housing and utilities (4,5% and contributing 1,1%) and
 - Food and non-alcoholic beverages (4,5% and contributing 0,8%).
- In September 2025, the annual inflation rate for goods was 2,9%, down from 3,1% in August 2025; and services was 3,9%, up from 3,6% in August 2025.

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 2,3% in September 2025, compared with 2,1% in August 2025. The producer price index (PPI) decreased by 0,1% month-on-month in September 2025.
- The main positive contributor to the headline PPI annual inflation rate was food products, beverages and tobacco products (3,8% and contributing 1,1%). The main negative contributor to the monthly rate was coke, petroleum, chemical, rubber and plastic products (-0,6% and contributing -0,1%).
- The annual percentage change in the PPI for intermediate manufactured goods was 7,6% in September 2025, compared with 6,5% in August 2025. The index increased by 1,1% month-on-month. The main positive contributor to the annual rate was basic and fabricated metals (16,3% and contributing 8,2%). The main positive contributor to the monthly rate was basic and fabricated metals (2,8% and contributing 1,5%).

- The annual percentage change in the PPI for electricity and water was 14,9% in September 2025, compared with 4,6% in August 2025. The index decreased by 18,2% month-on-month. The contributors to the annual rate were electricity (15,5% and contributing 13,3%) and water (11,6% and contributing 1,6%). The negative contributor to the monthly rate was electricity (-20,5% and contributing -18,2%).
- The annual percentage change in the PPI for mining was 16,0% in September 2025, compared with 8,5% in August 2025. The index increased by 2,9% month-on-month. The positive contributors to the annual rate were:
 - non-ferrous metal ores (22,3% and contributing 11,1%);
 - gold and other metal ores (27,0% and contributing 7,4%); and
 - stone quarrying, clay and diamonds (21,0% and contributing 1,0%).
- The positive contributors to the monthly rate were non-ferrous metal ores (3,9% and contributing 2,1% and gold and other metal ores (5,9% and contributing 1,7%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was -1,1% in September 2025, compared with 3,0% in August 2025. The index decreased by 2,1% month-on-month. The negative contributor to the annual rate was agriculture (-2,1% and contributing -1,9%). The negative contributor to the monthly rate was agriculture (-2,4% and contributing -2,1%).

4.3 Future contract prices

Table 5: Closing prices on Thursday, 6 November 2025

	6 November 2025	6 October 2025	% Change
RSA White Maize per ton (Nov. 2025 contract)	R3 698,00	R3 677,00	0,57
RSA Yellow Maize per ton (Nov. 2025 contract)	R3 559,00	R3 526,00	0,94
RSA Wheat per ton (Nov. 2025 contract)	R5 820,00	R5 970,00	-2,51
RSA Sunflower seed per ton (Nov. 2025 contract)	R10 360,00	R10 000,00	3,60
RSA Soya-beans per ton (Nov. 2025 contract)	R7 341,00	R6 943,00	5,73
Exchange rate R/\$	R17,37	R17,28	0,52

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- October 2025 tractor sales of 857 units were almost 12% more than the 765 units sold in October 2024. Year-to-date tractor sales are now almost 21% up on last year. Seventeen combine harvesters were sold in October 2025, eleven less than the 28 units sold in October 2024. On a year-to-date basis, however, combine harvester sales are now approximately 8% up on last year.
- Prospects for agricultural machinery sales continue to be favourable. We have come through a period of strong competition in the market, where stock levels of some categories of machinery were high. The market is now returning to some sort of 'normality', although that is quite difficult to define in the agricultural machinery industry! Winter crop predictions look good and forecasts for the upcoming summer cropping season are encouraging. Weatherwise, a weak La Niña looks set to prevail for the rest of the year, an encouraging sign for summer crops. Overall, current predictions are that tractor and combine harvester sales will be in the order of 10% more than last year.

Table 6: Agricultural machinery sales

Equipment class	Year-on-year		Percentage Change %	Year-to-date		Percentage Change %
	October			October		
	2025	2024	2025	2024		
Tractors	857	765	12,03	6 630	5 496	20,63
Combine harvesters	17	28	39,28	197	182	8,24

Source: SAAMA press release, November 2025

PLEASE NOTE: The Food Security Bulletin for November 2025 will be released on **5 December 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