MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA SEPTEMBER 2025

Issued: 10 October 2025

Directorate: Statistics and Economic Analysis

- **During September 2025, significant rainfall was limited to the eastern, central interior and southern 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 565 864 tons, which includes imports of 1,740 million tons. It is also 14,1% less than the previous years' ending stocks.**
- **The expected commercial maize crop for 2025 is 16,178 million tons, which is 25,9% 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 2,523 million tons, which is 285,9% more than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the current 2025/26 marketing year are 80 292 tons, which is 7,1% less than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2025/26 marketing year are 53 839 tons, which is 26,0% less than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the current 2025/26 marketing year are 441 529 tons, which is 213,8% more than the previous years' ending stocks.**
- **The annual percentage change in the CPI was lower at 3,3% in August 2025.**
- **The annual percentage change in the PPI for final manufactured goods was higher at 2,1% in August 2025.**
- **September 2025 tractor sales of 758 units were almost 15% more than the 660 units sold in September 2024.**

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1. Weather conditions

1.1 Rainfall for September 2025

During September 2025, significant rainfall was limited to the eastern, central interior and southern parts of the country (**Figure 1**). Comparing rainfall totals to the long-term average for September 2025, rainfall received was above-normal over most of the central interior and eastern parts of the country (**Figure 2**). (Source: Directorate: Climate Change and Disaster Management of Department: Agriculture).

Figure 1: Rainfall (mm) for September 2025

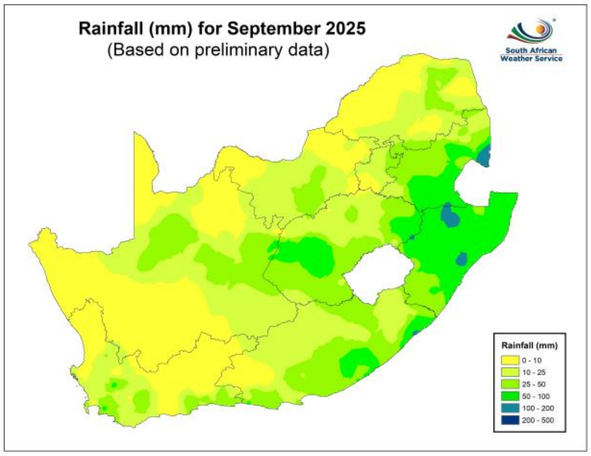
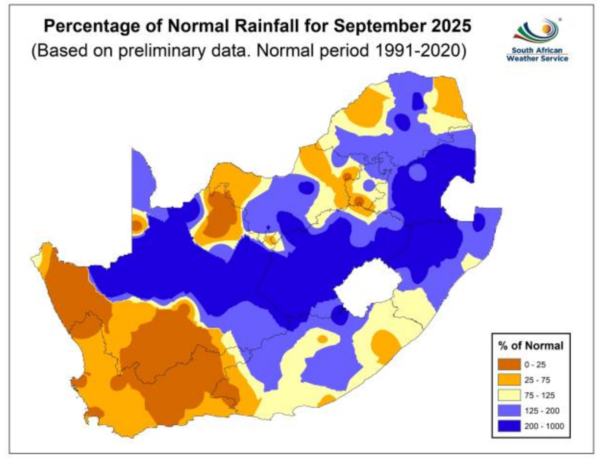


Figure 2: Percentage rainfall for September 2025



1.2 Level of dams

Available information on the level of South Africa's dams on 6 October 2025 indicates that the country has approximately 93% of its full supply capacity (FSC) available, which is 14,0% more as compared to the corresponding period in 2024. The North West Province (30%), Free State (20%), Gauteng (14%), Northern Cape (11%), Mpumalanga (11%), KwaZulu-Natal (10%), Limpopo (9%) and Eastern Cape (2%), all show increases in the full supply capacity as compared to 2024. However, the Western Cape Province is the only province that shows a decrease (-10%) 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, 6 October 2025

Province	Net FSC million cubic meters	**06/10/2025 (%)**	Last Year (2024) (%)	% Increase/Decrease 2025 vs. 2024
Eastern Cape	334	79	77	2,0
Free State	1 728	97	77	20,0
Gauteng	15 657	100	86	14,0
Kindom of Lesotho	128	91	77	14,0
Kingdom of Eswatini	4 910	89	80	9,0
Kwazulu-Natal	2 363	94	84	10,0
Limpopo	1 485	82	73	9,0
Mpumalanga	2 538	94	83	11,0
North West	146	92	62	30,0
Northern Cape	866	82	71	11,0
Western Cape	1 866	84	94	-10,0
Total	32 021	**93**	**79**	14,0

Source: Department of Water and Sanitation

2. Grain production

2.1 Summer grain crops - 2025

The area planted and eighth production forecast for summer grains for the 2025 season was released by the Crop Estimates Committee (CEC) on 30 September 2025, and is as follows:

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

CROP	Area planted 2025 Ha (A)	**8th 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	**8 327 650**	1 554 750	6 055 000	37,53%
Yellow maize	997 000	**7 850 850**	1 081 500	6 795 000	15,54%
Total Maize	2 596 700	**16 178 500**	2 636 250	12 850 000	25,90%
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	**19 936 535**	4 438 600	15 530 495	28,37%

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 16 178 500 tons, which is 25,90% or 3 328 500 tons more than the 12 850 000 tons of the previous season (2024). The yield for maize is 6,23 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 8 327 650 tons, which is 37,53% or 2 272 650 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 7 850 850 tons, which is 15,54% or 1 055 850 tons more than the 6 795 000 tons of last season. The yield for yellow maize is 7,87 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 nineth production forecast for summer field crops for 2025 will be released on 28 October 2025.

2.2 Winter cereal crops – 2025

The CEC also released revised area planted estimate and second production forecast for winter cereals for 2025 on 30 September 2025.

Table 3: Winter cereals: Revised area planted estimate and second production forecast - 2025 season

CROP	**Area planted 2025 Ha (A)**	**2nd forecast 2025 Tons (B)**	Area planted 2024 Ha (C)	Final crop 2024 Tons (D)	Change % (B) ÷ (D)
Commercial[1]:					
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**	**311 640**	165 750	290 400	7,31%
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**	**2 770 663**	818 750	2 655 250	4,35%

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 was revised to 517 300 ha, which is 5 600 ha more than the 511 700 ha of the previous forecast. 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 311 640 tons, which is 7,31% or 21 240 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 third production forecast for winter cereals for 2025 will be released on 28 October 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 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

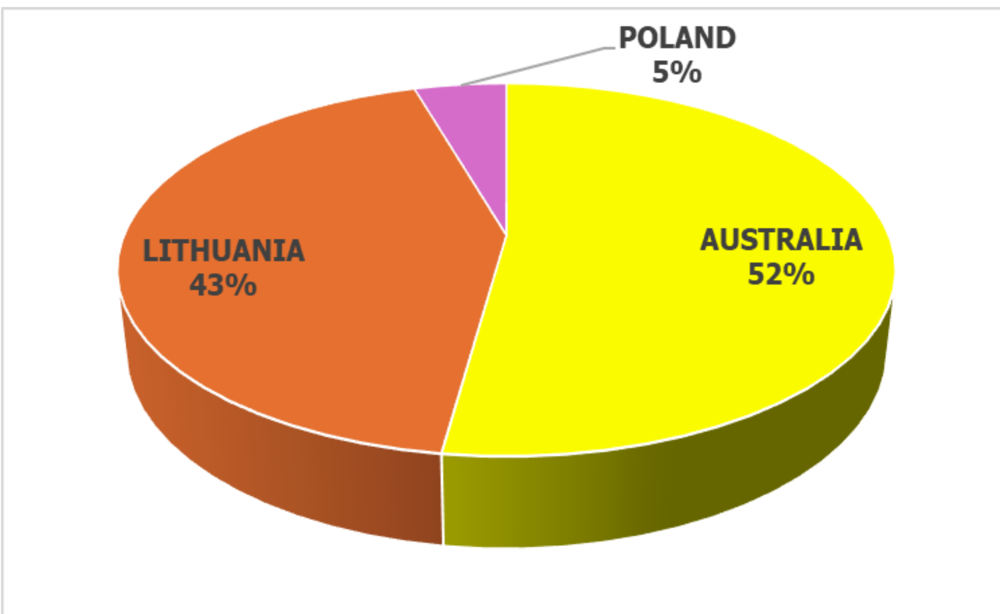
- The area planted to maize in the non-commercial agricultural sector is estimated at 358 000 ha, which represents an increase of 3,17%, compared to the 347 000 ha of the previous season. The expected maize crop for this sector is 621 500 tons, which is 8,09% more than the 575 000 tons of last season. 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 SEP25 Annexure A.

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

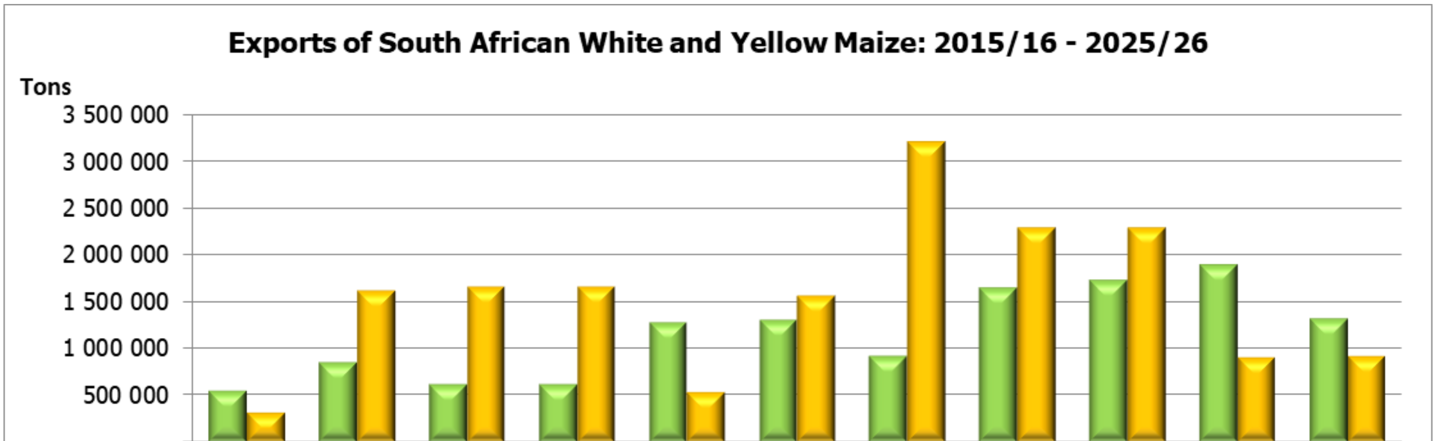
Graph 1: Major countries of wheat imports to South Africa: 2025/26 marketing year



- The progressive wheat imports (human consumption) for the 2025/26 marketing year (27 September to 3 October 2025) amount to 20 362 tons, with 52,00% or 10 632 tons from Australia, followed by 43,00% or 8 800 tons from Lithuania and 5,00% or 930 tons from Poland. The exports of wheat (human consumption) for the above-mentioned period amount to 2 611 tons, of which 35,00% or 905 tons went to Zambia, 34,00% or 892 tons went to Lesotho, 23,00% or 604 tons went to Zimbabwe and 8,00% or 210 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

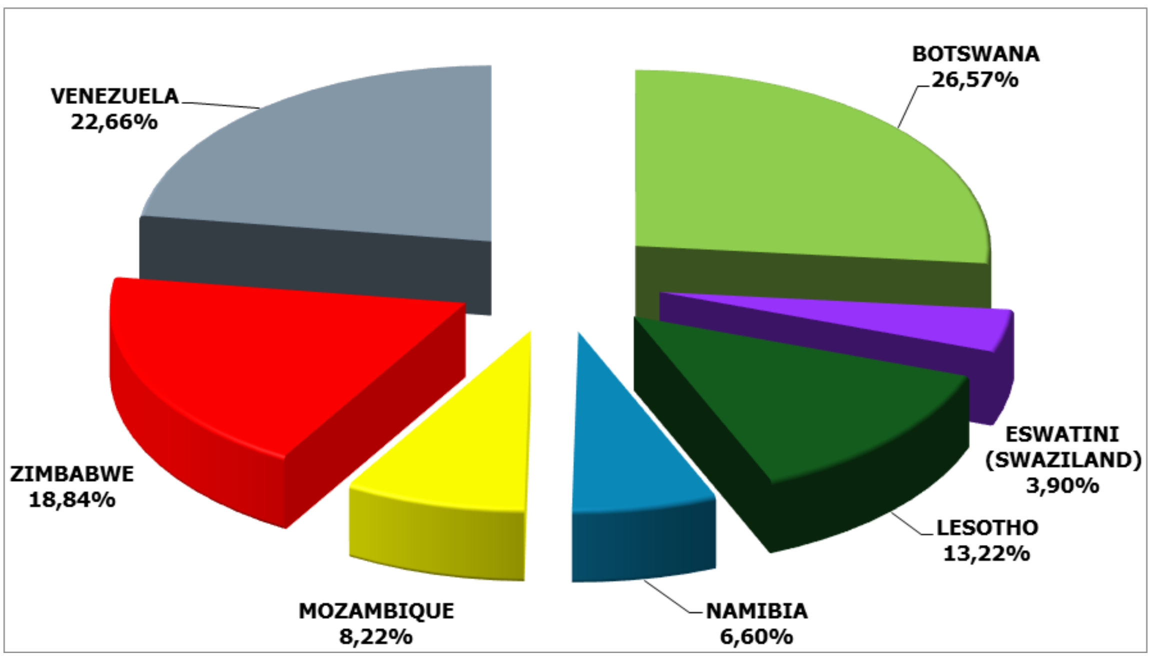


	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26*
White maize	557 063	851 969	617 000	616 651	1 275 446	1 304 475	924 434	1 654 525	1 734 933	1 893 603	1 320 000
Yellow maize	322 748	1 629 739	1 666 000	1 667 407	534 127	1 563 315	3 210 777	2 295 281	2 296 110	904 926	928 000

*Projection

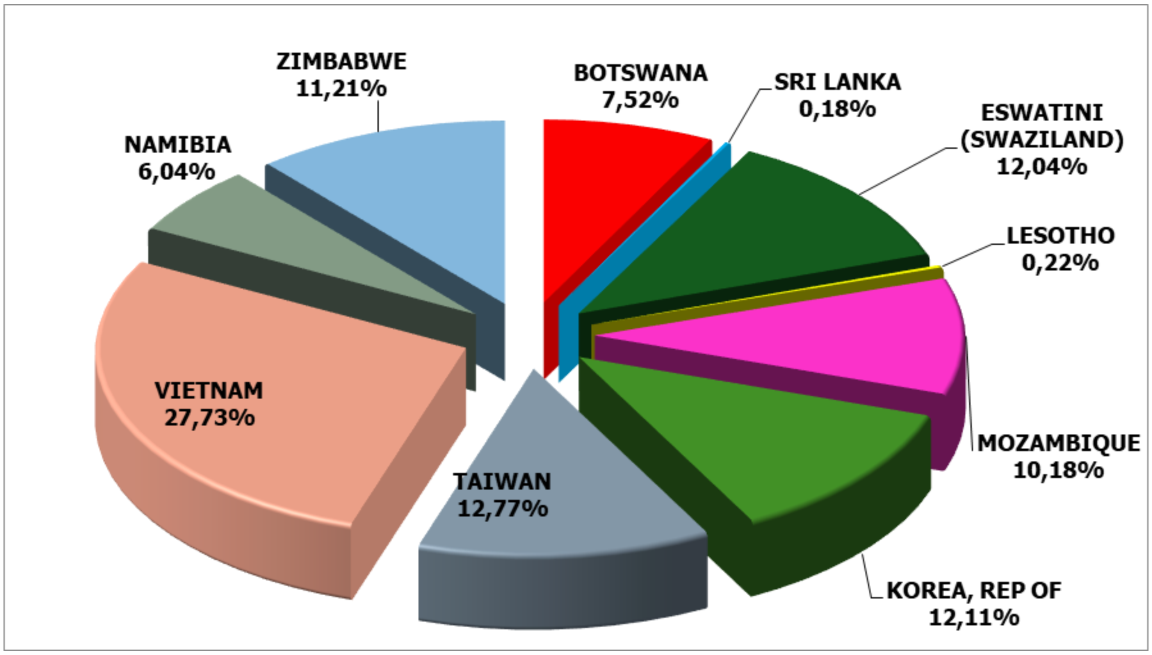
- The exports of white maize for the 2025/26 marketing year are projected at 1,320 million tons, which represents a decrease of 30,29% or 573 603 tons compared to the 1,894 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 928 000 tons, which represents an increase of 2,55% or 23 074 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 3 October 2025, progressive white maize exports for the 2025/26 marketing year amount to 291 272 tons, with the main destinations being Botswana (26,57% or 77 394 tons) followed by, Venezuela (22,66% or 66 001 tons), Zimbabwe (18,84% or 54 870 tons), Lesotho (13,22% or 38 495 tons), Mozambique (8,22% or 23 937 tons), Namibia (6,60% or 19 219 tons) and Eswathini (Swaziland) (3,90% or 11 356 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 3 October 2025, progressive yellow maize exports for the 2025/26 marketing year amount to 393 451 tons, with the main destinations being, Vietnam (27,73% or 109 120 tons), followed by Taiwan (12,77% or 50 255 tons), Republic of Korea (12,11% or 47 633 tons), Eswathini (Swaziland) (12,04% or 47 376 tons), Zimbabwe (11,21% or 44 091 tons), Mozambique (10,18% or 40 040 tons), Botswana (7,52% or 29 581 tons), Namibia (6,04% or 23 768 tons), Lesotho (0,22% or 874 tons) and Sri Lanka (0,18% or 713 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 3,3% in August 2025, down from 3,5% in July 2025. The CPI decreased by 0,1% month-on-month in August 2025.
- The main contributors to the 3,3% annual inflation rate were:
  - Housing and utilities (4,3% and contributing 1,0%); and
  - Food and non-alcoholic beverages (5,2% and contributing 0,9%).
- In August 2025, the annual inflation rate for goods was 3,1%, down from 3,2% in July 2025; and services was 3,6%, unchanged from July 2025.

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 2,1% in August 2025, compared with 1,5% in July 2025. The producer price index (PPI) increased by 0,3% month-on-month in August 2025. The main positive contributor to the headline PPI annual inflation rate was food products, beverages and tobacco products (4,3% and contributing 1,3%). The main positive contributors to the monthly rate were food products, beverages and tobacco products (0,4% and contributing 0,1%), coke, petroleum, chemical, rubber and plastic products (0,4% and contributing 0,1%), as well as metals, machinery, equipment and computing equipment (0,5% and contributing 0,1%)
- The annual percentage change in the PPI for intermediate manufactured goods was 6,5% in August 2025, compared with 6,4% in July 2025. The index increased by 0,3% month-on-month. The main positive contributor to the annual rate was basic and fabricated metals (13,3% and contributing 6,7%). The main positive contributors to the monthly rate were chemicals, rubber and plastic products (0,6% and contributing 0,2%) and basic and fabricated metals (0,3% and contributing 0,2%).

- The annual percentage change in the PPI for electricity and water was 4,6% in August 2025, compared with 4,9% in July 2025. The index decreased by 1,9% month-on-month. The contributors to the annual rate were electricity (3,4% and contributing 3,1%) and water (11,6% and contributing 1,2%). The contributor to the monthly rate was electricity (-2,1% and contributing -1,9%).
- The annual percentage change in the PPI for mining was 8,5% in August 2025, compared with 7,5% in July 2025. The index increased by 1,3% month-on-month. The positive contributors to the annual rate were non-ferrous metal ores (12,9% and contributing 6,4%); gold and other metal ores (16,9% and contributing 4,6%); stone quarrying, clay and diamonds (31,8% and contributing 1,4%). The main positive contributor to the monthly rate was non-ferrous metal ores (1,8% and contributing 0,9%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was 3,0% in August 2025, compared with 6,5% in July 2025. The index decreased by 2,3% month-on-month. The main contributors to the annual rate were agriculture (2,4% and contributing 2,1%) and fishing (8,2% and contributing 0,7%). The contributor to the monthly rate was agriculture (-2,8% and contributing -2,4%).

4.3 Future contract prices

Table 5: Closing prices on Thursday, 9 October 2025

	9 October 2025	**9 September 2025**	**% Change**
RSA White Maize per ton (Oct. 2025 contract)	R3 463,00	R3 945,00	-12,22
RSA Yellow Maize per ton (Oct. 2025 contract)	R3 353,00	R3 680,00	-8,88
RSA Wheat per ton (Oct. 2025 contract)	R5 995,00	R6 222,00	-3,65
RSA Sunflower seed per ton (Oct. 2025 contract)	R9 829,00	R10 672,00	-7,90
RSA Soya-beans per ton (Oct. 2025 contract)	R6 833,00	R7 345,00	-6,97
Exchange rate R/$	R17,10	R17,45	-2,01

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- September 2025 tractor sales of 758 units were almost 15% more than the 660 units sold in September 2024. Year-to-date tractor sales are now 22% up on last year. Eight combine harvesters were sold in September 2025, nine less than the 17 units sold in September 2024. On a year-to-date basis, however, combine harvester sales are now approximately 17% up on last year.
- Market sentiment remains positive, with the Crop Estimates Committee predicting good summer crop production, significantly up on last year. Winter crop predictions, except for barley, are marginally up on last year. Looking ahead, weather predictions are that a weak La Niña will affect summer and winter cropping areas in the forthcoming few months. This should mean favourable conditions for winter crops and the summer crops which farmers will be planting in the next few months.
- Current predictions are still that tractor sales will be between 10 and 15% more than last year. Combine harvester sales in 2025 also look as though they are going to be higher than last year.

Table 6: Agricultural machinery sales

Equipment class	Year-on-year		Percentage	Year-to-date		Percentage
	September		**Change**	**September**		**Change**
	2025	**2024**	**%**	**2025**	**2024**	**%**
Tractors	758	660	14,85	5 773	4 731	22,02
Combine harvesters	8	17	-52,94	180	154	16,88

Source: SAAMA press release, October 2025

PLEASE NOTE: The Food Security Bulletin for October 2025 will be released on **7 November 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