

Economic Review of the South African Agriculture 2025



agriculture

Department:
Agriculture
REPUBLIC OF SOUTH AFRICA

Economic Review
of the
South African
Agriculture

2026

DEPARTMENT OF AGRICULTURE

Compiled by the Directorate: Statistics and Economic Analysis, Private Bag X246, Pretoria 0001

Published in the Republic of South Africa by the Department of Agriculture

Obtainable from the website of the Department of Agriculture at
www.nda.gov.za

2026

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FOREWORD

The total value of primary agricultural production in South Africa is estimated at R500 492 million in 2025, which is 9,5% higher than the R456 980 million in 2024. The sector showed a positive nominal growth of approximately R183 670 million, or 4,5% and contributed 2,7% to the country's total value added (GDP) in 2025. On average, the primary agricultural sector has grown nominally by 8,1% per year since 2015.

Despite its relatively small share of the total GDP, primary agriculture is an important sector in the South African economy. Agriculture remains one of the biggest employers, especially in the rural areas and it is also a major earner of foreign exchange.

Agriculture's prominent, indirect role in the economy is a function of backward and forward linkages to other sectors. Purchases of goods such as fertilisers, chemicals and implements form backward linkages with the manufacturing sector, while forward linkages are established through the supply of raw materials to the manufacturing industry. About 70% of agricultural output is used as intermediate products in the sector. Agriculture is therefore a crucial sector and an important engine for growth for the rest of the economy.

This publication, which appears every six months, offers easy-to-find information to give some idea of the macroeconomic position of agriculture. The focus areas are agriculture's contribution to the national economy and trends regarding the most important agricultural economic indicators.

Whether you are directly involved or only have interest in agriculture, you are bound to find this publication useful and informative. We welcome your observations on its content and format. If you have comments or questions, please contact the Director: Statistics and Economic Analysis.

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March 2026

ECONOMIC REVIEW OF SOUTH AFRICAN AGRICULTURE FOR THE YEAR ENDED 31 DECEMBER 2025

Summary

Total gross farming income earned from agricultural production increased by R40 159 million (8,7%) to R500 248 million in 2025, largely driven by the increase in income from field crops (15,6%), horticultural products (9,1%) and animal products (4,4%).

Prices received by farmers for agricultural products increased by 2,4%, driven by the increases in the average prices of animal products (5,1%) and horticultural products (0,3%).

The average price of field crops decreased slightly by 0,4%, mainly due to lower prices of summer grains (3,5%), oilseeds (2,8%), and sugar cane (1,7%). In contrast, the prices of dry beans increased by 32,9%, tobacco (16,5%), hay (16,1%), winter grains (3,2%), and cotton (0,1%).

A slight increase of 0,3% in the average price of horticultural products was driven by increases in the prices of viticulture (10,3%) and fruit (2,9%). However, the prices of vegetables decreased by 5,6%.

The average price of animal products increased by 5,1% and was driven by the increase in the price of slaughtered stock. Prices of milk decreased by 5,3%, pastoral products (5,0%) and poultry (2,1%).

The prices paid for farming requisites, including machinery and implements, material for fixed improvements as well as intermediate goods, decreased slightly by 0,7%, as opposed to a decrease of 3,9% in the previous period. This was mainly due to the decrease in prices of animal health and crop protection by 12,5%, fertilisers (4,2%), fuel (3,6%) and feed (2,2%).

The terms of trade showed an increase of 2,4% from 1,24 in 2024 to 1,27 in 2025, due to improved prices received from the agricultural production, against a marginal decrease of 0,7% in production inputs costs.

Net farming income increased drastically by 24,8% to R137 927 million in 2025 as compared to R110 554 million in 2024.

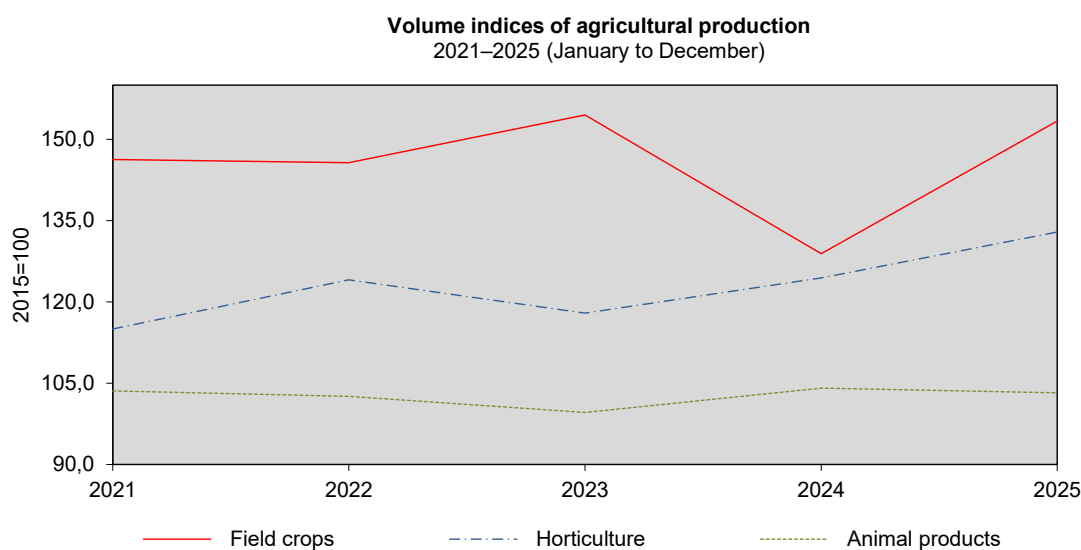
Volume of agricultural production

The estimated volume of agricultural production during 2025 was 6,7% more than in 2024.

The volume of field crop production increased by 18,9% during 2025, mainly because of an increase in the production of summer grains (maize and sorghum), oilseeds (sunflower seed, soybeans and groundnuts) and dry beans as well as the sugar cane.

Horticultural production increased by 6,8% for the above-mentioned period, which can mainly be attributed to the increase in the production of vegetables (sweet-potatoes, pumpkins, potatoes, green beans, cabbage and onions), citrus fruits (soft citrus, nartjies, lemons and oranges) and deciduous fruits (pears, peaches plums and wine grapes).

The production of animal products decreased by 0,8%, mainly because of a decrease in the production of the number of stock slaughtered (cattle and calves as well as sheep and lambs) during 2025.



Producer prices of agricultural products

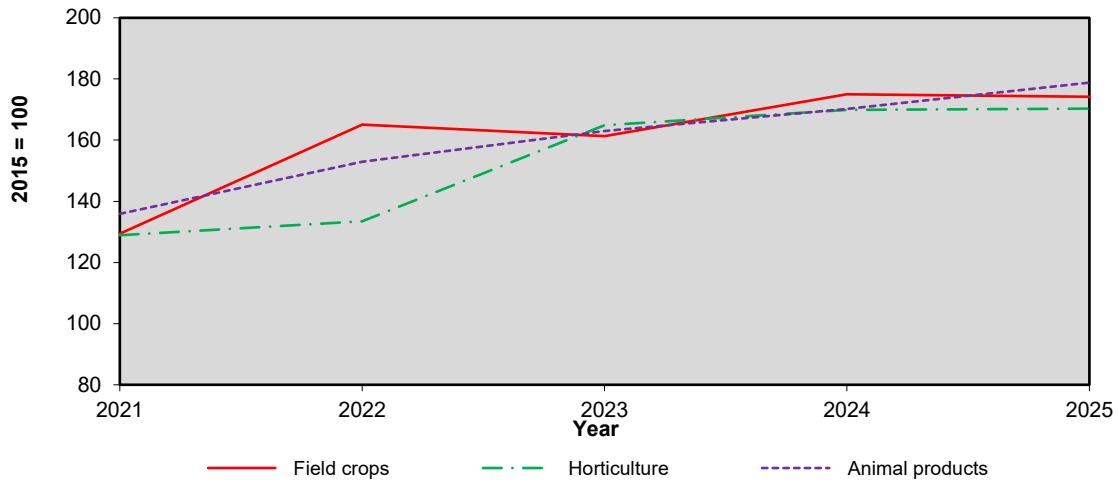
Prices received by farmers for agricultural products increased by 2,4%, driven by the increases in the average prices of animal products (5,1%) and horticultural products (0,3%).

Prices of field crops decreased slightly by 0,4% on average, mainly due to lower prices of summer grains (3,5%), oilseeds (2,8%), and sugar cane (1,7%). In contrast, the prices of dry beans increased by 32,9%, tobacco (16,5%), hay (16,1%), winter grains (3,2%), and cotton (0,1%).

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Producer price indices
2021 - 2025 (January to December)

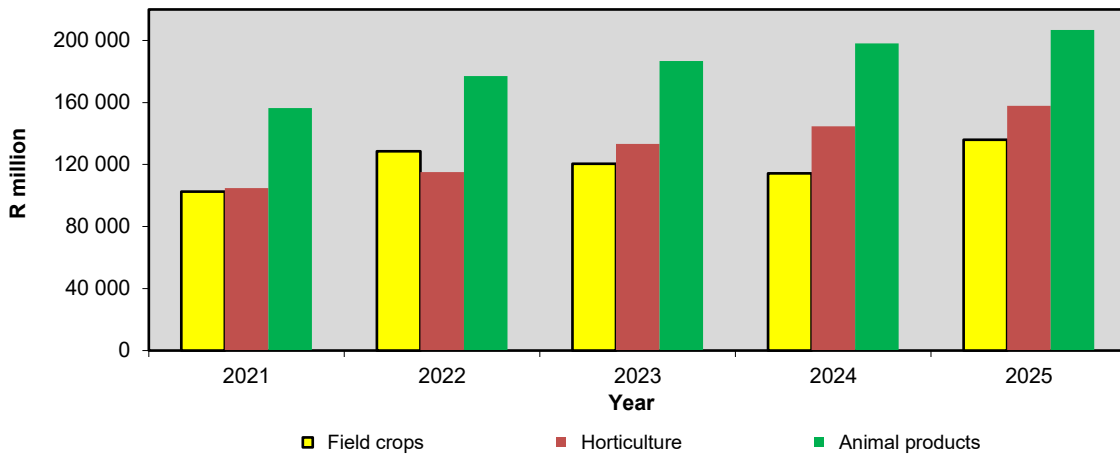


Gross value of agricultural production

The *total gross value of agricultural production* (total production during the production season valued at the average basic prices received by producers) for 2025 is estimated at R500 492 million, compared to R456 980 million the previous year—an increase of 9,5%. This increase can mainly be attributed to an increase in the value of field crops and horticulture.

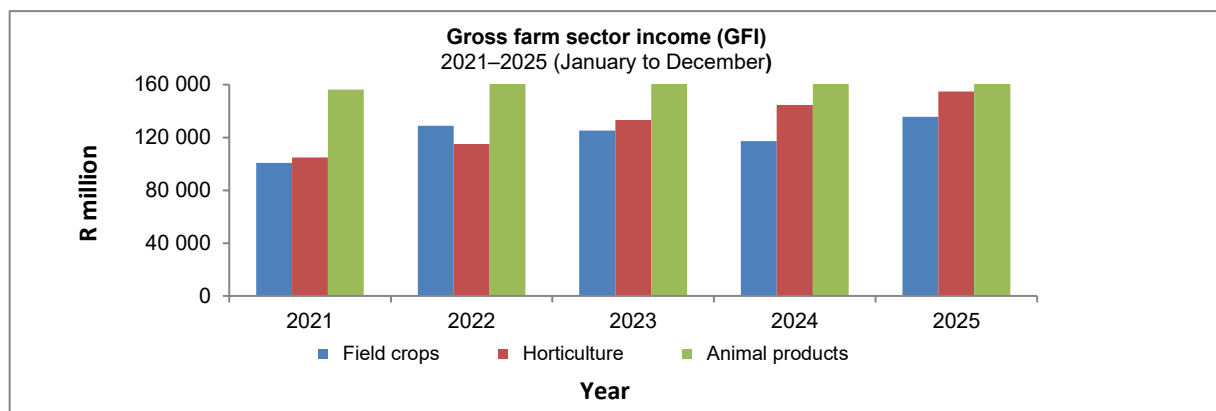
The gross value of animal products contributed 41,3% to the total gross value of agricultural production, while horticultural products and field crops contributed 31,5% and 27,2%, respectively. Poultry meat made the largest contribution with 14,9%, followed by maize with 14,5% and cattle and calves slaughtered with 9,9%.

Gross value of agricultural production
2021–2025 (January to December)



Farming income

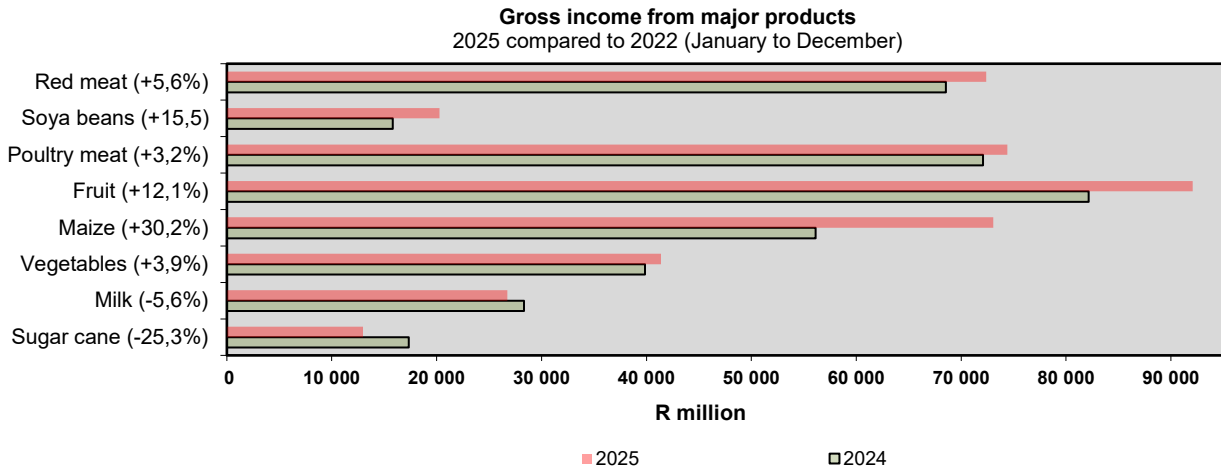
The *gross income of producers* (the value of sales and production for other uses, plus the value of changes in inventories) for the year ended 31 December 2025 increased by 8,7% and amounted to R500 248 million, compared to R460 089 million the previous year. This can be attributed to the increases in income obtained from animal, field and horticultural products.



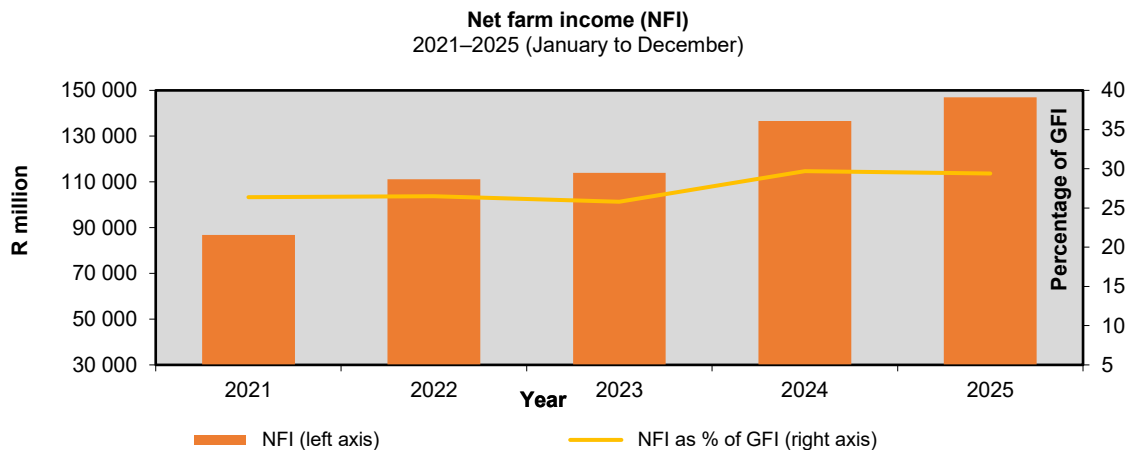
The *gross income from field crops* increased by 15,6% from R117 275 million in 2024 to R135 627 million for the year ended 31 December 2025. This was due to the increase in income from grain sorghum, dry bean, maize, soya bean, groundnuts, canola and sunflower seed by 58,1%, 53,7%, 30,2%, 28,2%, 18,1%, 15,5% and 10,2%, respectively. The income from sugar cane decreased by 25,3% and wheat by 7,0%.

The *gross income from animal products* was 4,4% higher in 2025 and estimated at R206 866 million, compared to R198 207 million of the previous year. The increase was attributed to income earned by the producers from eggs production by 7,1%, slaughtered stock by 5,6% and poultry meat by 3,2%. Income earned from milk production decreased by 5,6%.

The *gross income from horticultural products* increased by 9,1% to R157 755 million in 2025 from R144 608 million in 2024. The income earned by farmers from fruit increased by 12,1%, which amounted to R92 077 million. The income from vegetables was 3,9%, an increase from R39 856 million in 2024 to R41 402 million in 2025.



The *net farm income* (after the deduction of all production expenditure, excluding expenditure on fixed assets and capital goods) increased significantly by 24,8% and amounted to R137 927 for the period ended 31 December 2025, as opposed to R110 554 million the previous corresponding period. Payments for salaries and wages, which represented 16,1% of the total farming costs, amounted to



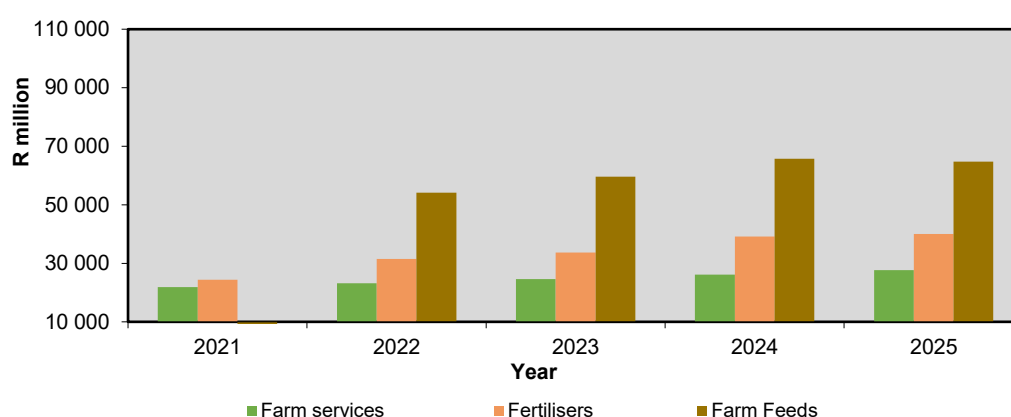
R58 186 million. Interest paid by farmers to banks and other financiers in 2025 was estimated at R19 186 million, or 5,3% of the total farming costs.

Expenditure on intermediate goods and services

Intermediate expenditure refers to the value of goods and services that were purchased for consumption as inputs during the production process.

The expenditure on intermediate goods and services increased by 3,4% to R270 806 million in 2025, as compared to R261 855 million in 2024. This was mainly driven by the increase in expenditure on packing material by 20,8%, building and fencing material by 10,0%, farm services by 6,0%, maintenance and repairs of machinery and implements by 3,6%, and fuel by 2,7% and fertilisers by 2,1%.

Expenditure on intermediate goods and services
2021-2025 (January to December)

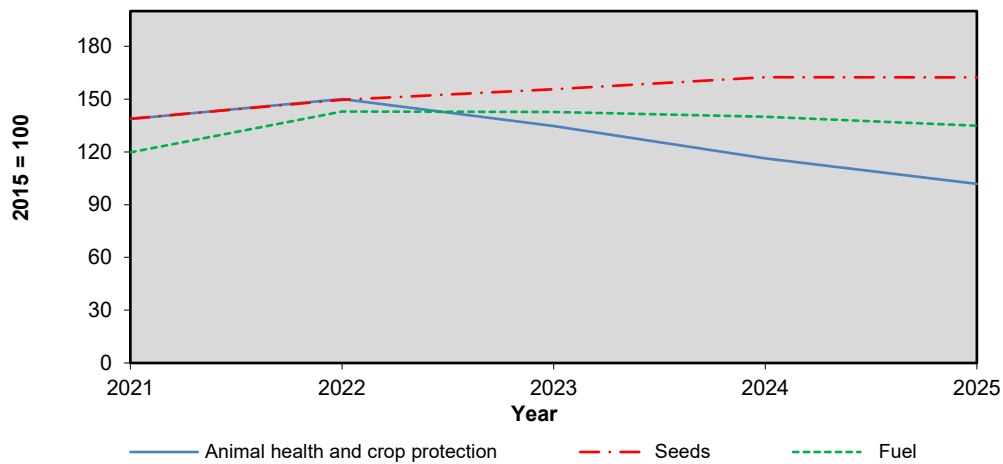


Farm feeds remained the main expenditure item, accounting for 23,9% of the total expenditure, followed by fertilisers (14,8%), farm services (10,2%), maintenance and repairs of machinery and implements (9,6%), fuel (8,2%), packing material (7,9%), animal health and crop protection (6,5%), seed and plants (5,8%) and building and fencing material (4,6%).

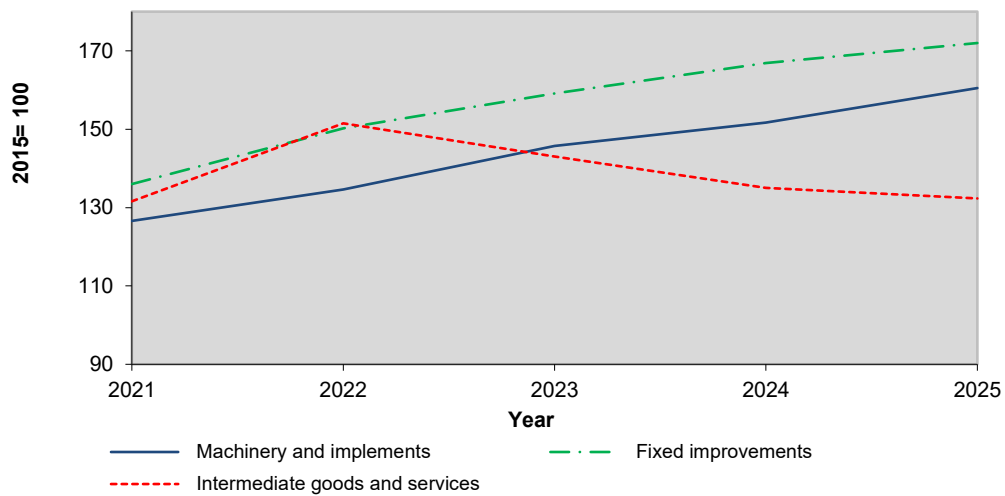
Prices of farming requisites

The prices paid for farming requisites, including machinery and implements, material for fixed improvements as well as intermediate goods, decreased marginally by 0,7%, as opposed to a decrease of 3,9% the previous period. This was mainly due to the decrease in prices of animal health and crop protection by 12,5%, fuel (3,6%) and seeds (0,1%). Prices of maintenance and repairs of machinery and implements increased by 7,1%, packaging material (5,2%), fencing material (4,5%), fertilisers (4,2%), building material (2,4%), feeds (2,2%), trucks (1,2%) and tractors (0,6%).

Price indices of certain intermediate goods
2021–2025 (January to December)



Price indices of farming requisites
2021–2025 (January to December)



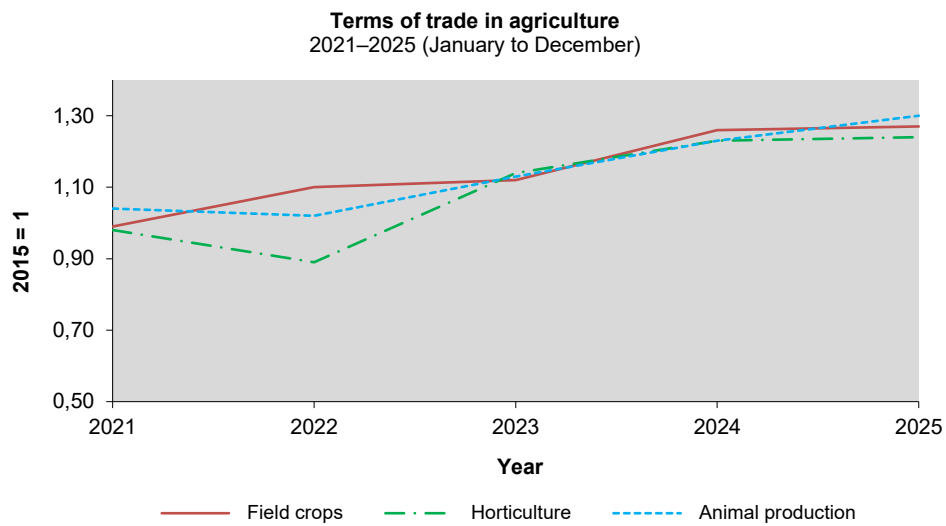
The combined price index for machinery and implements increased by 5,8% and material for fixed improvements by 3,1%, while the combine index for intermediate goods and services decreased by 2,0%.

Domestic terms of trade in agriculture (2015 = 1)

The terms of trade indicate the extent to which producer prices received by farmers kept pace with the prices paid for farming requisites.

The terms of trade improved by 2,4%, from 1,24 in 2024 to 1,27 in 2025, as the result of better prices received from agricultural products, especially prices of animal and horticultural products.

The terms of trade for field crops increased marginally by 0,8% (from 1,26 in 2024 to 1,27 in 2025), horticultural products also by 0,8% (from 1,23 in 2024 to 1,24 in 2025), and animal products by 5,7% (from 1,23 in 2024 to 1,30 in 2025).



Contribution of agriculture to value added at basic prices

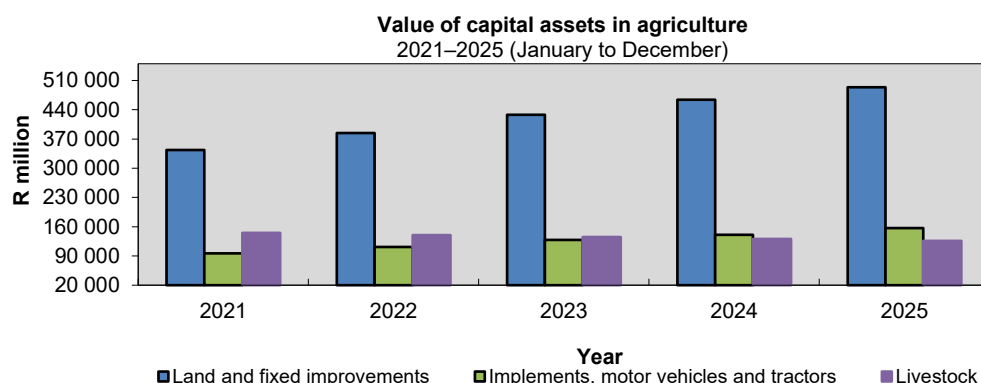
Value added is the value of total output less the value of intermediate consumption during the production period.

The summary below shows the overall contribution of the agricultural sector to the South African economy. The contribution of agriculture's value added for the year ended 31 December 2025 is estimated at R183 670 million in nominal terms and represented 2,7% of the total value added to the economy.

Year	Total value added	Contribution of agriculture to value added	Contribution of agriculture as percentage of total value added
	R million	R million	%
2014	3 738 791	74 694	2,0
2015	3 981 758	83 946	2,1
2016	4 288 841	97 669	2,3
2017	4 592 450	107 644	2,3
2018	4 829 603	103 059	2,1
2019	5 058 166	93 253	1,8
2020	5 035 875	121 928	2,4
2021	5 592 551	129 673	2,3
2022	5 990 574	147 659	2,5
2023	6 321 218	151 655	2,4
2024	6 625 579	175 688	2,7
2025	6 876 356	183 670	2,7

Capital assets and investment in agriculture

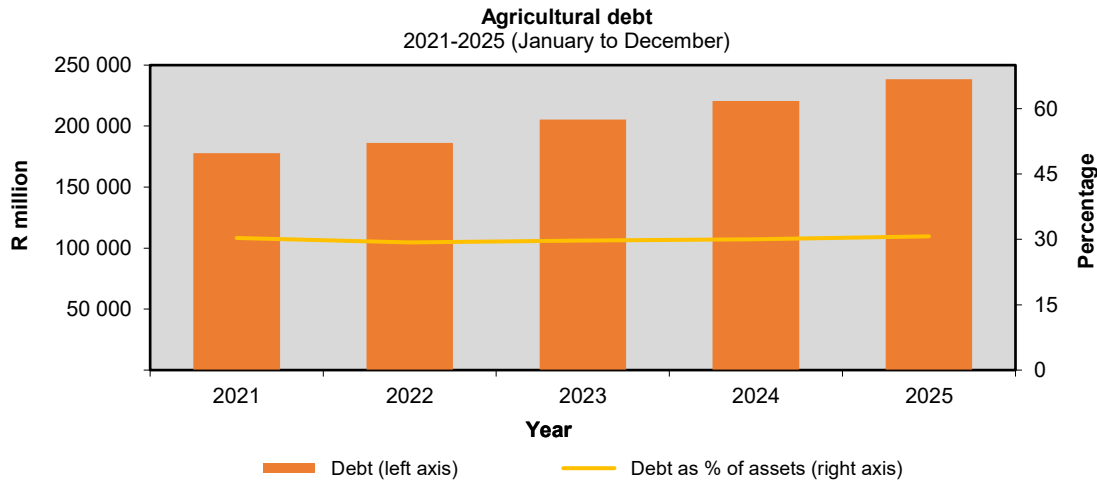
The value of capital assets in agriculture increased by 5,6% for the period ended 31 December 2025 and was estimated to be R766 086 million, compared to R734 872 million at the end of December 2024. Land and fixed improvements constituted the largest share of 63,6% of the total value of capital assets, followed by implements, motor vehicles and tractors (20,2%) and livestock (16,2%).



The gross investment in respect of fixed improvements for the year ended 31 December 2025 was 0,5% higher than in 2024 and was estimated at R10 727 million. In the case of machinery, implements and vehicles, investment increased by 22,4% and was estimated at R18 674 million. The livestock inventory was estimated at 22,3% (R187 million) more than the previous year.

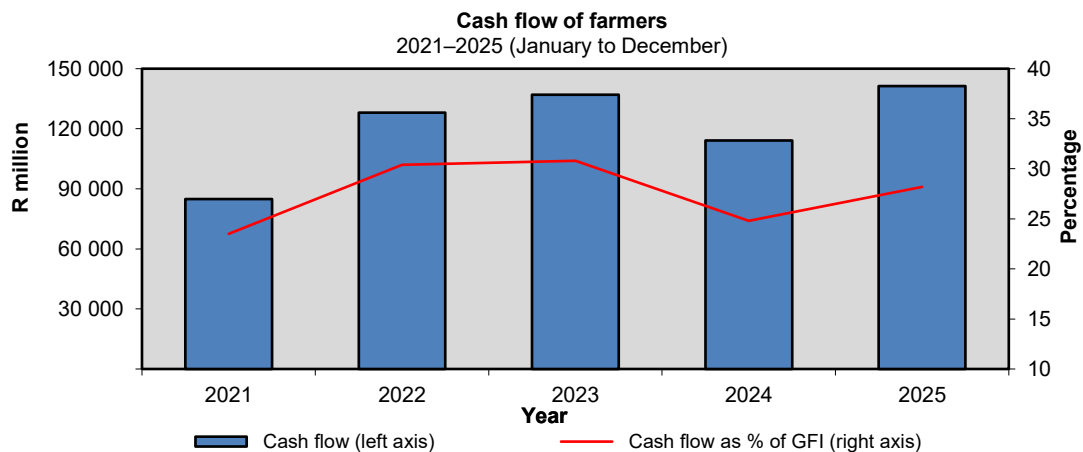
Farming debt

The total farming debt increased by 8,1% for the year ended 31 December 2025 and was estimated at R238 443 million, compared to R220 497 million at the end of 2024.



Cash flow of farmers

The farmers' cash flow increased by 23,8% and was estimated at R141 282 million in 2025, compared to R114 150 million in 2024. This increase was mainly driven by higher gross farming income and improved commodity prices.



Consumer prices

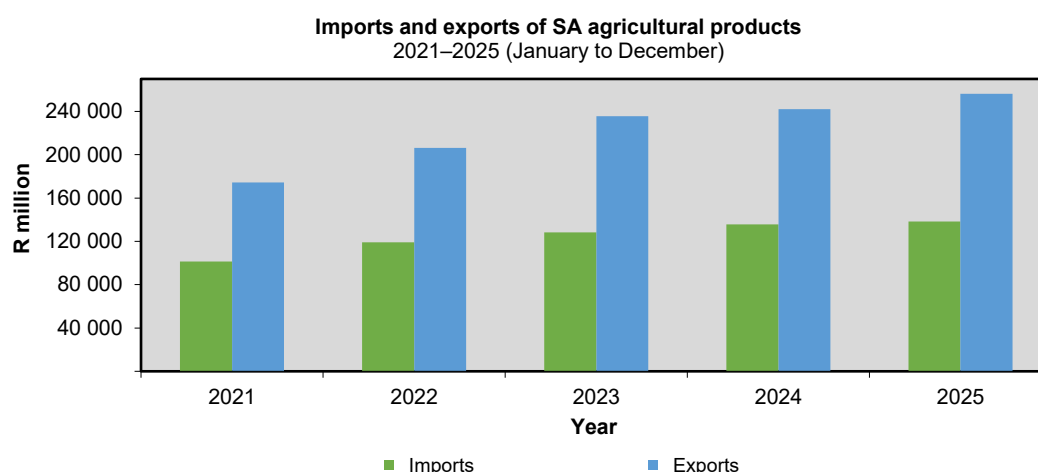
The consumer prices of all agricultural items increased by 3,2% in 2025, compared to an increase of 4,7% in 2024.

The prices of meat increased by 7,0%, food (3,7%), grain products (2,9%) while milk, eggs and cheese decreased slightly by 0,8%. The prices of coffee increased by 6,5%, sugar and fish (2,3%) each, fruit (1,7%) and vegetables (0,3%). The prices of other food items increased by 1,2%.

Imports and exports of SA agricultural products

The estimated value of imports during 2025 came to approximately R138 347 million, from R135 609 million in 2024—an increase of 2,0%.

The estimated value of exports showed an increase of 6,6%, from R240 368 million in 2024 to about R256 144 million in 2025.



According to the 2025 agricultural export figures, oranges (R16 930 million), soft citrus (R13 671 million), grapes (R11 809 million), apples (R11 579 million) and maize (R11 104 million) were the five most important export products in terms of value.

Based on 2025 agricultural imports figures, wheat and meslin (R10 578 million), palm oil (R10 364 million), milled rice (R9 711 million), sugar cane (R4 826 million) and food preparations (R3 205 million) were the five major products in terms of value.

In terms of exports of agricultural products by South Africa during 2025, the five largest trading partners were the Netherlands, with exports to the value of (R27 491) million, Zimbabwe (R19 446 million), United Kingdom (R19 301 million), Mozambique (R14 114 million) and Botswana (R13 385 million).

The top five largest trading partners in terms of value during 2025 were Eswatini (R9 260 million), China (R9 209 million), Thailand (R8 991 million), Brazil (R8 290 million) and Indonesia (R7 799 million).