TRENDS

IN THE
AGRICULTURAL SECTOR

2025

agriculture

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Agriculture
REPUBLIC OF SOUTH AFRICA

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in the
Agricultural Sector
2025

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ECONOMIC REVIEW OF THE SOUTH AFRICAN AGRICULTURE FOR THE YEAR ENDED 30 JUNE 2025

Summary

Gross farming income generated from all agricultural products increased marginally by 0,2% to R457 487 million for the period ended 30 June 2025, as opposed to R456 709 million earned in the previous corresponding period. This can be attributed mainly to the increase in income from horticultural and animal products by 5,8% and 5,2%, respectively.

The average price received by farmers for agricultural products increased by 6,0% in 2024/2025, compared to 6,5% in 2023/2024.

The prices paid for farming requisites, including machinery and implements, material for fixed improvements as well as intermediate goods and services decreased by 1,8% in 2024/2025, compared to the decrease of 8,0% in 2023/2024. This was caused by the decrease in prices of animal health and crop protection by 10,8%, fuel by 6,5% and fertilisers slightly by 0,7%.

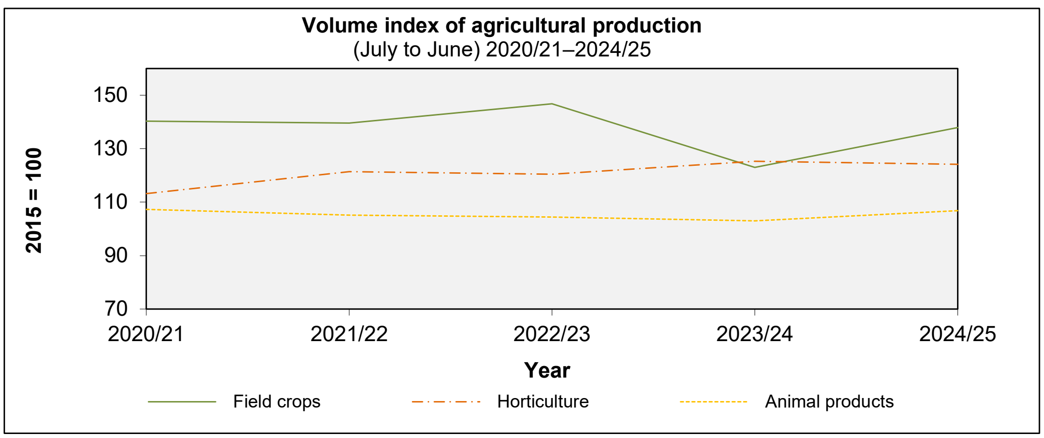
The domestic terms of trade increased by 7,6% from 1,19 to 1,28, because of better prices received from agricultural products and decreased production costs.

The values of imported and exported agricultural products increased by 7,0% and 4,2%, respectively, in 2024/25.

Volume of agricultural production

The estimated volume of agricultural production in 2024/25 was 4,5% more than in 2023/24.

The volume of field crop production increased by 12,2% during 2024/25, mainly because of an increase in the



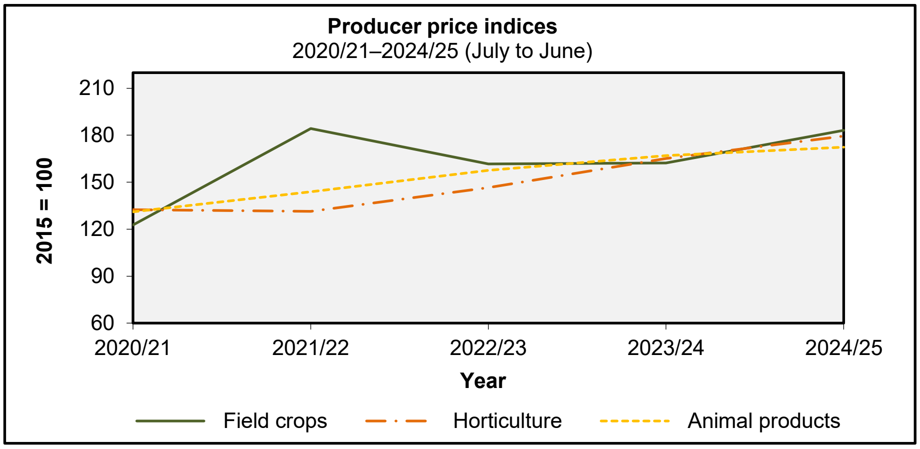
production of summer crops (maize and sorghum), oilseeds (sunflower seed, soya beans and groundnuts), as well as dry beans. Furthermore, the production of winter crops (oats and canola) also increased as compared to 2023/24.

Horticultural production decreased by 0,8% for the above-mentioned period, which can mainly be attributed to a decrease in the production of subtropical fruits (guavas, mangoes, avocadoes, litchis, bananas and pineapples), as well as deciduous fruits (apricots and apples). Furthermore, the production of dried fruits and nuts also contributed to a decrease in horticultural products as compared to the previous season.

Animal production increased by 3,7%, mainly because of an increase in the production of stock slaughtered (cattle, sheep and lamb, pork and goat), eggs and poultry meat, as well as pastoral animal products (wool, mohair and ostrich feathers) as compared to 2023/24.

Producer prices of agricultural products

The prices received by farmers for agricultural products increased by 6,0% on average in 2024/2025, compared to an average increase of 6,5% in 2023/2024.



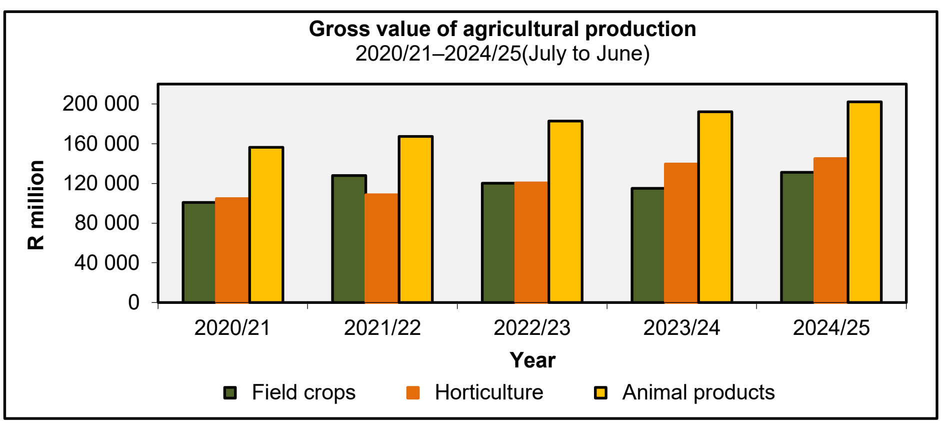
The average price of field crops increased by 12,8% due to the increase in prices of summer grains by 27,5%, tobacco by 24,9%, dry beans by 13,3% and sugar cane by 11,6%. The prices of hay decreased by 12,7%, winter grains and oilseeds by 3,2% each and cotton slightly by 0,3%.

The average price of horticultural products increased by 5,4% and was driven by the increase in prices of fruit by 9,5% and viticulture by 7,4%. The price of vegetables decreased slightly by 0,1%.

The average price of animal products increased by 3,2% due to the increase in prices of slaughtered stock by 7,4%, milk by 3,5% and poultry meat slightly by 0,8%. The price of pastoral products decreased by 8,1%.

Gross value of agricultural production

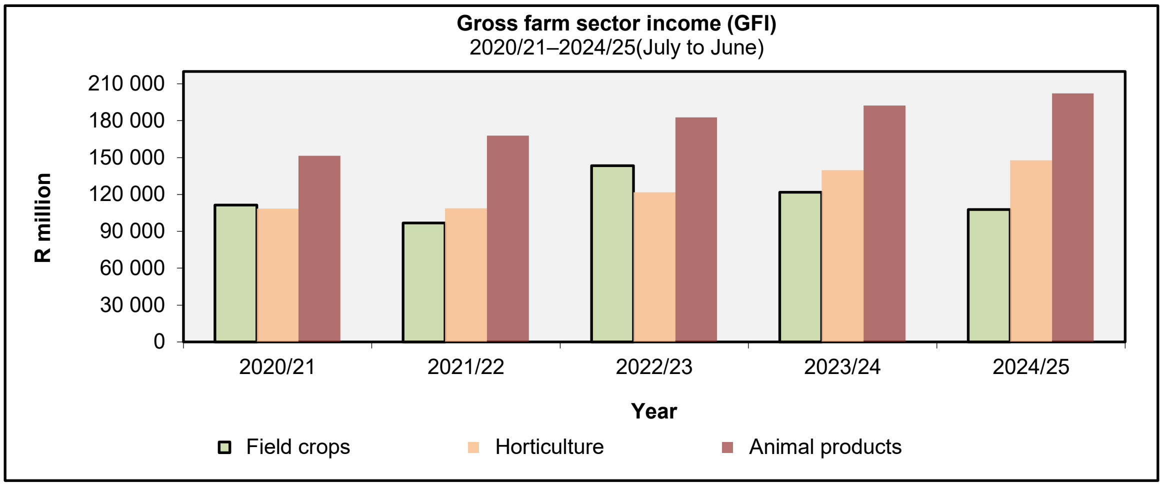
The *total gross value of agricultural production* (total production during the production season valued at the average basic prices received by producers) for 2024/25 is estimated at R478 418 million, compared to R446 972 million the previous year—an increase of 7,0%. This increase can mainly be attributed to the increase in the value of field crops and animal products by 13,9% and 5,2%, respectively.



The gross value of animal products contributed 42,3% to the total gross value of agricultural production, horticultural products with 30,3% and field crops with 27,4%. The poultry meat industry made the largest contribution with 15,3%, followed by maize with 14,0% and cattle and calves slaughtered with 10,1%.

Farming income

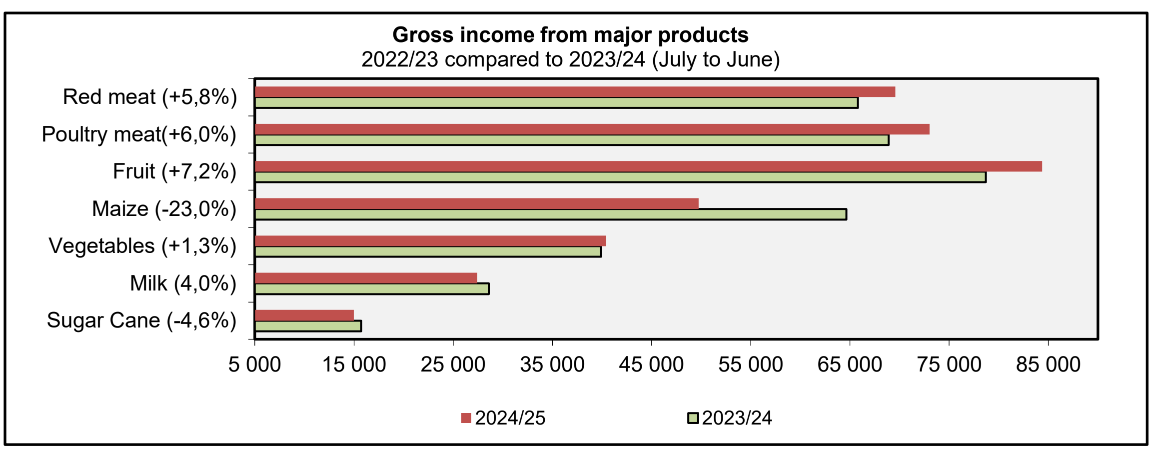
The *gross income of producers* (the value of sales and production for other uses, plus the value of changes in inventories) increased slightly by 0,2% and is estimated at R457 487 million in 2024/2025, compared to R456 709 million in 2023/2024. The increase in gross farming income was largely driven by the increase in income generated from horticultural and animal products by 5,8% and 5,2%, respectively.

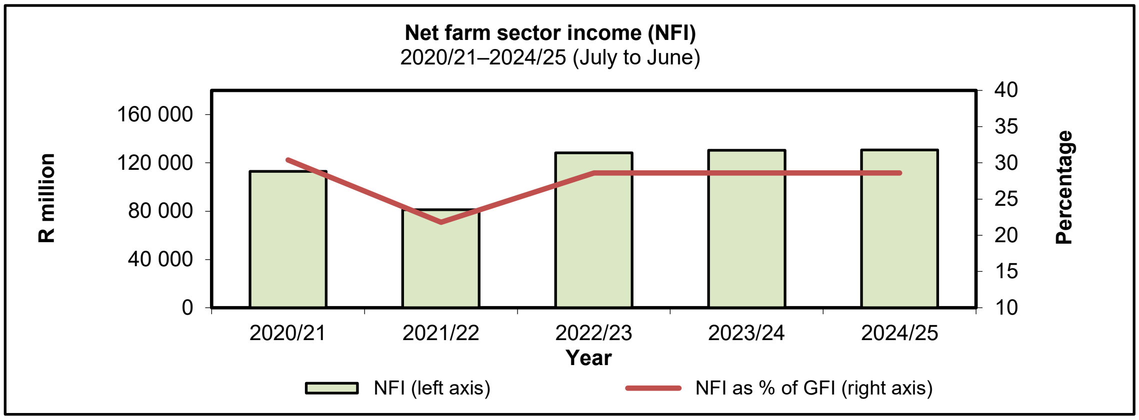


The gross income earned from field crops decreased significantly by 13,8% to R107 629 million in 2024/2025, from R124 889 million of the previous period. The reason for the decrease in income from field crops was the decrease in income derived from sunflower seed by 78,0%, maize and cotton (23,0%) each, wheat (9,5%), sugar cane (4,6%), grain sorghum (2,9%) and barley (2,4%).

The gross income from horticultural products increased by 5,8% and amounted to R147 740 million in 2024/2025, compared to R139 604 million in 2023/2024. This was influenced by the increase in income from citrus fruit by 12,8%, deciduous and other fruit by 5,5% and vegetables by 1,3%. The income obtained from subtropical fruit decreased by 6,9% and viticulture by 2,2%.

The gross income from animal products increased by 5,2% and amounted to R202 118 million for the year ended June 2025, as compared to R192 217 million the previous period. This can be attributed to the increase in income from sheep slaughtered by 12,3%, cattle and calves slaughtered by 7,0%, poultry meat by 6,0% and eggs by 2,8%. The income earned by milk producers decreased by 4,8%.



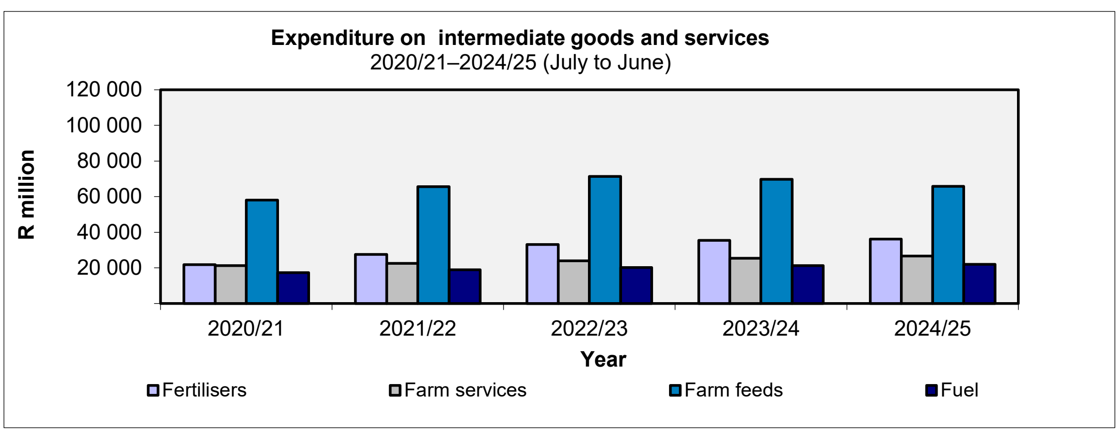


The *net farm income* (after the deduction of all production expenditure, excluding expenditure on fixed assets and capital goods) increased marginally by R230 million or 0,2% in 2024/2025. Salaries and wages that were paid to workers by farmers are estimated at R57 470 million for the year ended June 2025 and represented 17,1% of the total farming costs. Interest paid by farmers to banks and other financiers is estimated to be R18 377 million, representing 5,5% 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.

Expenditure on intermediate goods and services decreased by 1,1% and is estimated at R245 788 million for the period ended 30 June 2025. The increase can be attributed to the decrease in expenditure on farm feeds by 6,8%, animal health and crop protection by 6,1%, seed and plants by 4,9% and packing material by 1,3%.

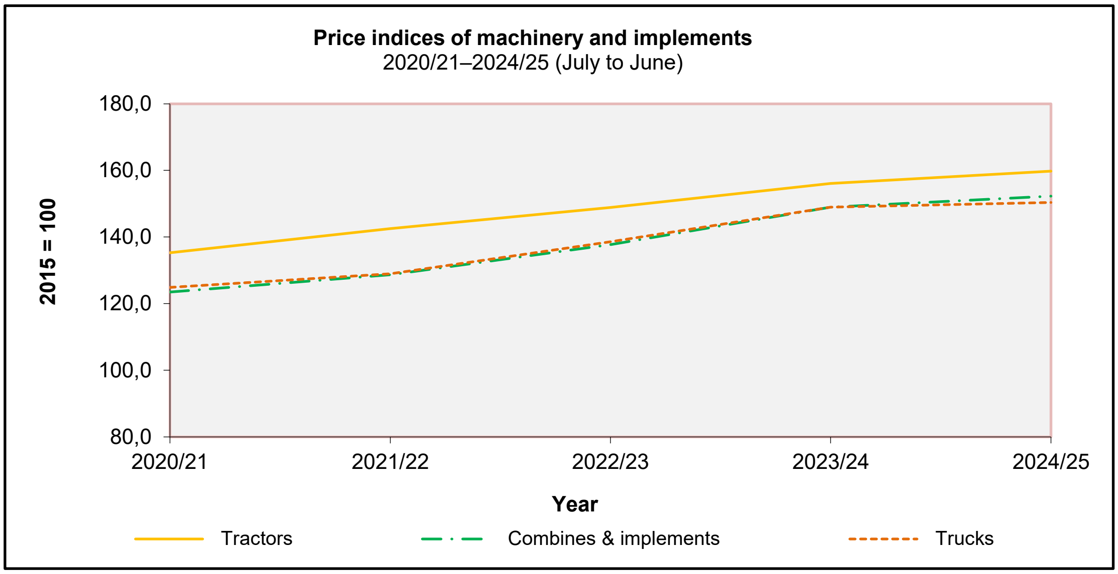


Farm feeds accounted for the largest share of 26,8% to total expenditure on agricultural inputs, followed by fertilisers (14,7%), farm services (10,8%), maintenance and repairs of implements and machinery (9,5%), fuel (8,9%), seed and plants (6,4%), packing material (5,3%), building and fencing material (4,7%) and animal health and crop protection (4,1%).

Prices of farming requisites

The prices paid for farming requisites, including machinery and implements, material for fixed improvements as well as intermediate goods and services decreased by 1,8% in 2024/2025, compared to the decrease of 8,0% in 2023/2024. This was caused by the decrease in prices of animal health and crop protection by 10,8%, fuel by 6,5% and fertilisers slightly by 0,7%.

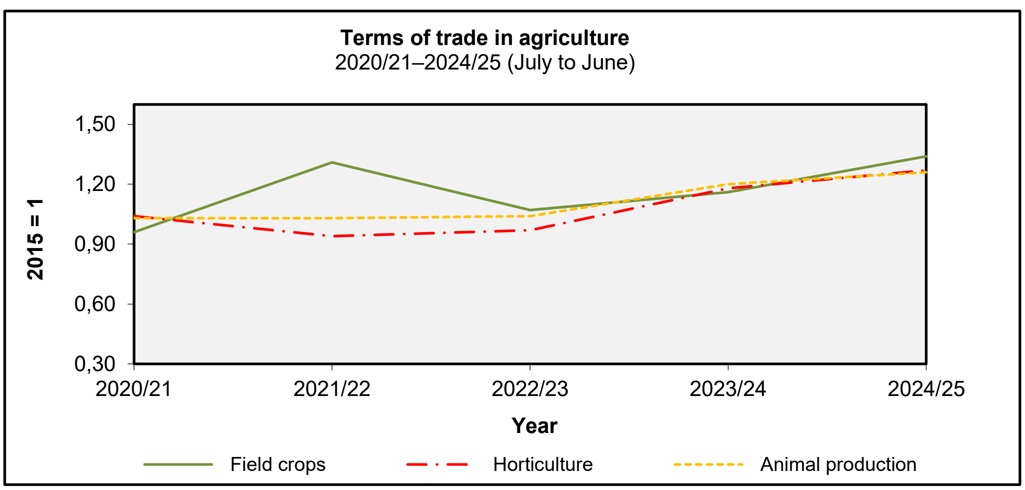
The combined price index of materials for fixed improvements increased by 4,6% and machinery and implements by 1,8%, while that of intermediate goods and services decreased by 2,8%.



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 domestic terms of trade increased by 7,6% from 1,19 to 1,28 because of better prices received from agricultural products. The terms of trade for field crops increased by 15,5% (from 1,16 to 1,34), horticultural products by 7,6% (from 1,18 to 1,27) and animal products by 5,0% (from 1,20 to 1,26).



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 agricultural sector's overall contribution to the South African economy. The contribution of agriculture to value added for the year ended 31 December 2024 is estimated at R181 889 million, which represents 2,7% of the total value added to the economy.

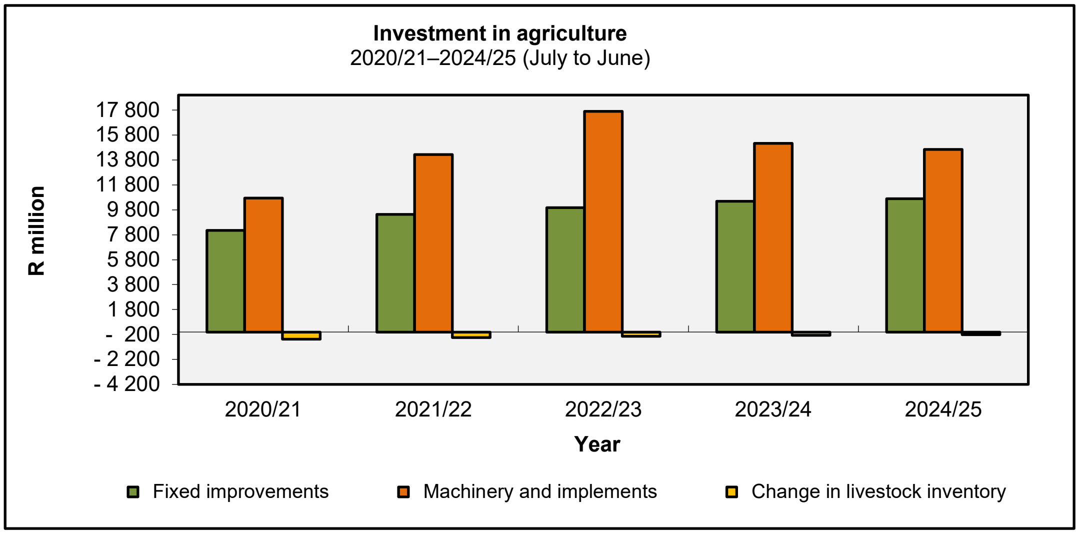
Year	Total value added R' million	Contribution of agriculture to value added R' million	Contribution of agriculture as percentage of total value added %
2014	3 738 791	77 331	2,1
2015	3 981 758	86 908	2,2
2016	4 288 841	101 116	2,4
2017	4 592 450	111 443	2,4
2018	4 829 603	106 696	2,2
2019	5 058 166	96 544	1,9
2020	5 035 875	126 231	2,5
2021	5 592 551	134 250	2,4
2022	5 990 574	152 870	2,6
2023	6 321 218	157 007	2,5
2024	6 625 579	181 889	2,7

Capital assets and investment in agriculture

The value of capital assets in agriculture showed an increase of R27 643 million (3,9%) to R744 111 million for the period ended June 2025, compared to R716 468 million the previous corresponding period.

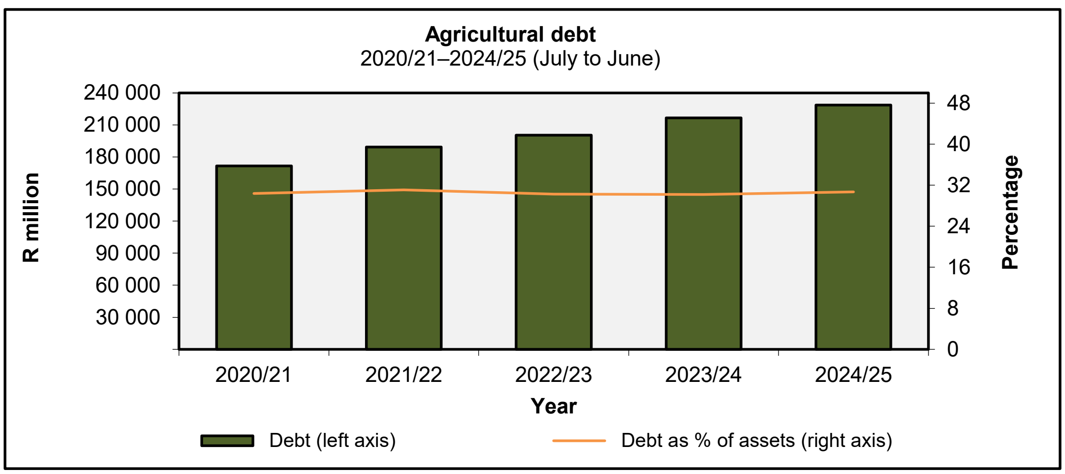
The proportion of land and fixed improvements to the total value of capital assets was R473 600 million (62,9%), machinery and implements (R142 342 million or 19,1%) and livestock (R128 169 million or 17,2%).

The gross investment in fixed improvements increased by 2,2% (R10 700 million) for the period ended June 2025, machinery and other equipment decreased by 3,1% (R14 653 million) and transport vehicles decreased by 0,2% (R2 272 million). Livestock inventory was estimated at 28,7% (R61 million) more than in the previous period.



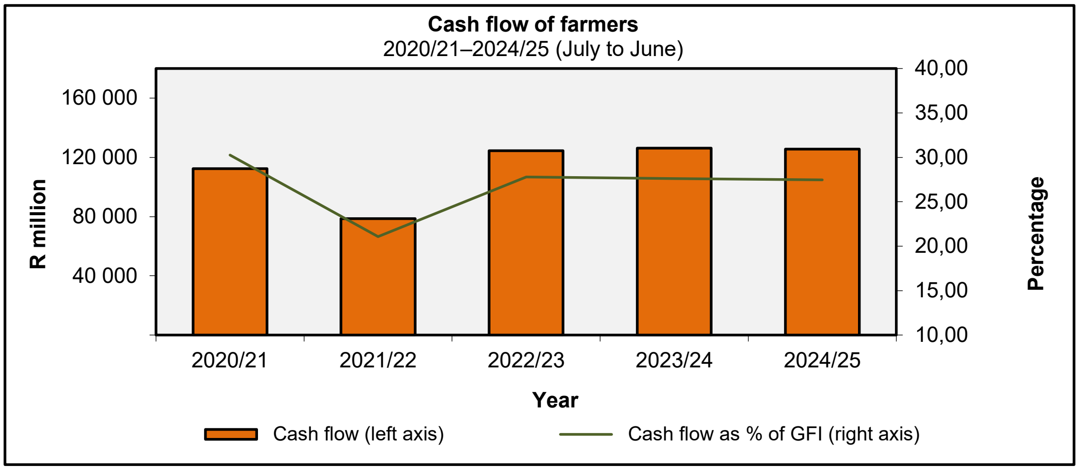
Farming debt

The total farming debt has increased by 5,5% and is estimated at R228 550 million for the year ended June 2025, compared to R216 653 million at the end of June 2024.



Cash flow of farmers

The farmers' cash flow decreased by 0,4% and is estimated at R125 659 million in 2024/25, as opposed to R126 126 million in 2023/24.



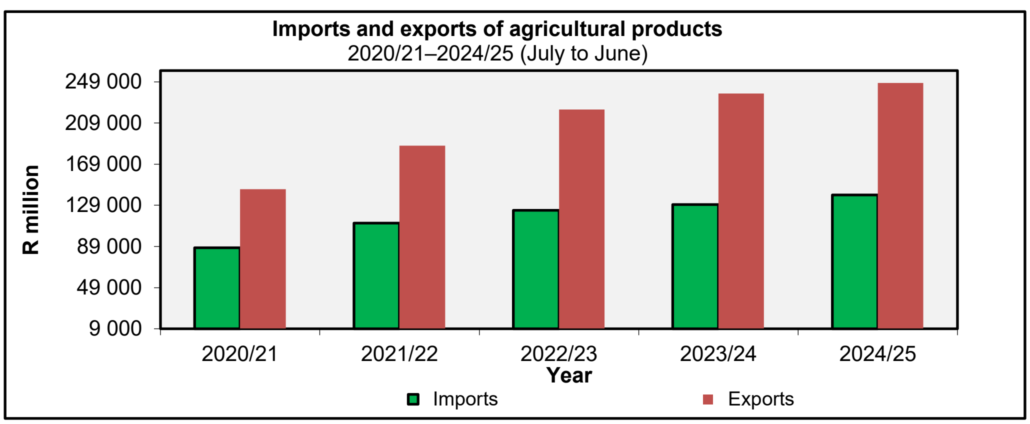
Consumer prices

The consumer prices of all agricultural products increased by 3,3% in 2024/25, as compared to an increase of 5,3% in 2023/24. The consumer prices of grain products increased by 4,4%, non-food items by 3,2%, food by 2,9%, milk, eggs and cheese by 2,0% and meat by 1,4%.

The consumer prices of coffee and tea increased by 14,3%, sugar by 6,0%, fruit by 5,2%, fish by 5,0%, vegetables by 4,1%, other food by 2,9% and fats and oils by 2,2%.

Imports and exports of agricultural products

The estimated value of imports for 2024/25 amounted to R138 950 million, an increase of 7,0% from R129 818 million in 2023/24. The value of exports increased by 4,2%, from R237 841 million in 2023/24 to R247 875 million in 2024/25.



According to the 2024/25 export values, oranges (R14 176 million), maize (R13 400 million), grapes (R11 569 million), soft citrus (R11 153 million) and apples (R10 782 million), were the most important agricultural export products. Milled rice (R10 889 million), palm oil (R10 308 million), wheat (R10 025 million), sugar cane (R4 378 million) and food preparations (R3 292 million) accounted for the highest imports in terms of value.

During 2024/25, the Netherlands, with exports to the value of R25 883 million, Zimbabwe (R21 191 million), the United Kingdom (R18 908 million), Botswana (R14 142 million) and Namibia (R14 059 million) were the five largest trading partners of South Africa in terms of export destinations for agricultural products.

The five largest trading partners for South Africa's imported agricultural products during 2024/25 were Thailand (R9 865 million), China (R9 459 million), Brazil (R9 322 million), Eswatini (R8 651 million) and Indonesia (R7 575 million).

Branches of the industry

FIELD CROP HUSBANDRY

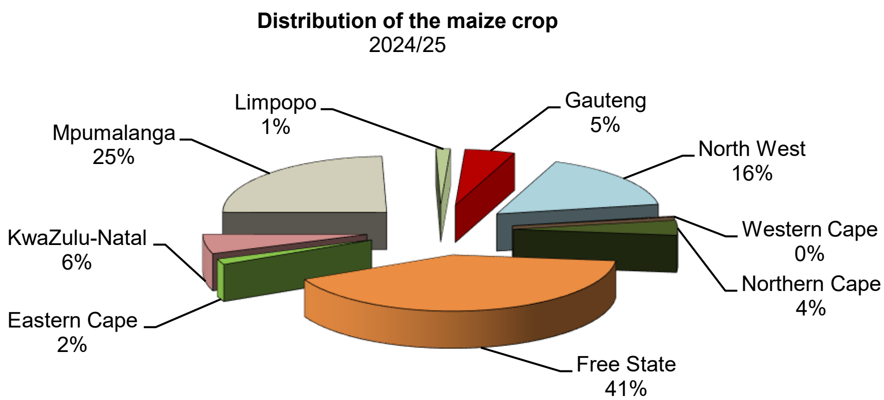
Maize

Maize is the most important grain crop in South Africa, being both the major feed grain and the staple food of the majority of the South African population. About 51,5% of maize produced in South Africa is white and the remaining 48,5% is yellow maize (2025). White maize is primarily used for human consumption, while yellow maize is mostly used for animal feed production.

The gross value of agricultural production is determined by the quantity produced and prices received by producers.

The largest contributor towards the gross value of field crops for 2024/25 is maize (52,9%), followed by soya beans (14,3%), sugar cane (11,3%), wheat (7,6%), and sunflower seed (4,5%). The gross value of maize for 2024/25 amounts to R71 987 million, which is 31,1% or R17 100 million more than the R54 888 million for 2023/24.

The contribution by provinces to maize production during the 2024/25 production season is depicted in the following figure.



White maize is generally produced in the western parts of the maize belt, while yellow maize is planted in the eastern parts.

The three main white maize-growing provinces in South Africa, namely, Free State, Mpumalanga and North West, produced about 90% of the white maize harvest in 2025, whereas the two main yellow maize-growing provinces, namely, Free State and Mpumalanga, produced about 67% of the yellow maize harvest.

Maize is planted during late spring/early summer, with optimal planting times in November and December. However, planting can start as early as October and extend to January. In a particular season, the rainfall pattern and other weather conditions determine the planting period as well as the length of the growing season. Most of the maize is harvested from late May up to the end of August.

The present ratio of areas planted is 61,6% white maize to 38,4% yellow maize. An estimated 4,6% of the area planted to white maize is under irrigation and 95,4% is dryland, while the estimate for yellow maize is 16,5% under irrigation and 83,5% is dryland.

About 85,0% of South Africa’s maize production is grown with GM seeds.

Area planted and production

The 2024/25 summer crop season began slowly due to sporadic rainfall in October 2024 and a heatwave in November 2024, which delayed progress in maize planting. However, consistent and adequate rainfall across most of South Africa’s maize-producing regions by mid-December allowed producers to begin planting in earnest. After a dry and hot January, above-average rainfall in February and March across much of the summer rainfall production area significantly boosted plant growth and improved yields. Since most of South Africa’s maize is rainfed, with less than 10 % under irrigation, sufficient rainfall during February and March—particularly during the grain-filling stage—directly enhances yield potential.

The estimated area that South African commercial producers planted to maize during the 2024/25 season is 2,597 million ha. This is 1,5% or 39 550 ha less than the 2,636 million ha planted the previous season and 1,7% or 45 610 ha less than the five-year average of 2,642 million ha planted up to 2023/24.

Commercial white and yellow maize plantings for 2024/25 were 1 599 700 ha and 997 000 ha, respectively. This represents an increase of 2,9% for white maize and a decrease of 7,8% for yellow maize.

The commercial maize crop for the 2024/25 production season is estimated to be 16,178 million tons, with an estimated yield of 6,23 t/ha. The production represents an increase of 25,9% from the previous season (2023/24), which was estimated at 12,850 million tons.

The production estimate for white maize for 2025 is 8,328 million tons, which is 37,5% or 2,273 million tons more than the 6,055 million tons of 2024 and 5,3% or 416 150 tons more than the average of the five years (7,912 million tons) up to 2024. The estimated yield for white maize is 5,21 t/ha, compared to 3,89 t/ha the previous season.

In the case of yellow maize, the production estimate for 2025 is 7,851 million tons, which is 15,5% or 1,056 million tons more than the 6,795 million tons the previous season and 6,6% or 489 350 tons more than the five-year average (7,362 million tons) up to 2024. The estimated yield for yellow maize was 7,87 t/ha, compared to 6,28 t/ha in 2024.

For the 2024/25 season, 64,2% of the deliveries of white maize were grade WM1, compared to 97,5% of the 2023/24 crop and 87,0% of the yellow maize deliveries were grade YM1, compared to 90,6% of the 2023/24 crop.

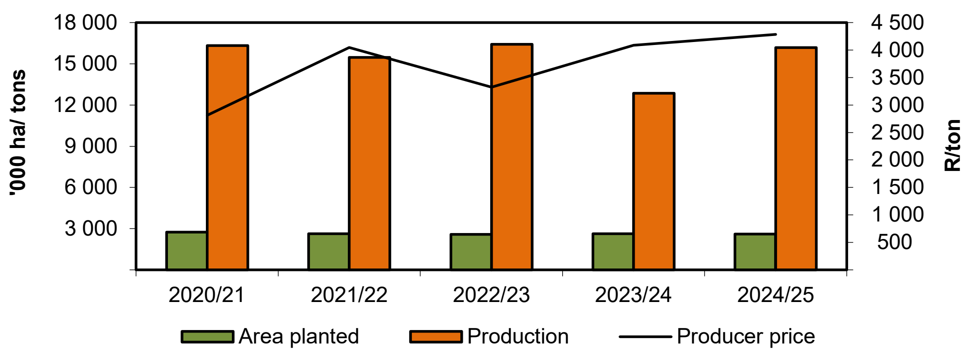
Plantings, production and yields of commercial maize from 2020/21 to 2024/25 are as follows:

Season	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25**
Plantings (ha)	2 755 400	2 623 000	2 586 100	2 636 250	2 596 700
Production (t)	16 315 000	15 470 000	16 430 000	12 850 000	16 178 500
Yield (t/ha)	5,92	5,90	6,35	4,87	6,23

The estimated yield for maize is 6,23 t/ha for 2024/25, which is 27,9% or 1,36 t/ha more than the 4,87 t/ha the previous season. This is the third highest yield on record for maize in the RSA. The higher yield this season is largely due to a recovery from the previous year's drought, with good rainfall in many areas and healthy soil moisture levels creating favourable conditions.

The area planted, production and producer prices of maize are depicted in the following graph:

Maize: Area planted, production and producer prices
2020/21–2024/25



In South Africa, the breadbasket of the southern African region, the maize sector comprises both commercial and non-commercial farmers; the latter being mostly in Eastern Cape, Limpopo, Mpumalanga and northern KwaZulu-Natal.

The area planted to maize by the non-commercial sector during 2024/25 is estimated at 358 000 ha, which comprises 275 150 ha of white maize and 82 850 ha of yellow maize. Production by the non-commercial sector is estimated at 621 500 tons: 439 700 tons of white maize and 181 800 tons of yellow maize. Maize grown by this sector is mainly for own use and contributes only approximately 3,7% to total production.

Prices

Since the deregulation of the South African agricultural market in 1996, the maize market has essentially been an open market in which several basic factors play a role in determining prices. These factors include:

- International maize prices;
- Exchange rates;
- Local production (influenced by weather conditions and area planted);
- Local consumption;

- Production levels in the Southern African Development Community region (South Africa is usually the main source of white maize for these countries in times of shortage); and

- Stock levels (both domestic and international).

Based on domestic stock levels, the domestic prices of maize fluctuate within a band that is determined by world prices, the exchange rate and local maize production. Because of the erratic weather conditions in the country, substantial variations in local production occur.

During periods of shortages, the rand price of maize tends to increase towards import parity, which is the international maize price *plus* transport and other costs, multiplied by the exchange rate. During surplus periods, the rand price tends to move towards export parity, which is the price of maize on the international market *minus* transport and other costs, multiplied by the exchange rate.

Currently, the prices of maize differ from one area to another and can fluctuate daily. Producers can manage their price risk by negotiating spot, contract or futures prices on SAFEX, based on market conditions.

The average producer price of maize increased by 4,8%, from R4 088,47/t in 2023/24 to R4 284,84/t in 2024/25, mainly due to the tight maize supply at the beginning of the season attributable to the drought in 2024, which significantly affected maize production.

The average producer prices of maize from 2020/21 to 2024/25 are as follows:

Season	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25**
	R/ton				
Producer price	2 812,08	4 047,25	3 324,30	4 088,47	4 284,84

The South African maize market has matured considerably since the deregulation of marketing. Producers, traders and other intermediaries interact freely in the marketing of maize.

Supply and demand

Most of the maize produced in South Africa is consumed locally; as a result, the domestic market is very important to the industry.

Considering the 2025/26 marketing season (May to April), the total supply of maize is projected at 16,749 million tons (8,561 million tons white and 8,188 million tons yellow). This includes an opening stock (on 1 May 2025) of 653 790 tons (365 498 tons white and 288 292 tons yellow) and local commercial deliveries of 15,544 million tons (8,133 million tons white and 7,411 million tons yellow). Maize imports of 400 000 tons (no white maize and 400 000 tons of yellow maize) is projected for the 2025/26 season.

The total demand, local and exports, for maize is projected at 14,226 million tons (7,074 million tons of white and 7,152 million tons of yellow maize). The total local demand is projected at 11,978 million tons (5,754 million tons white and 6,224 million tons yellow). A projected export quantity of 2,248 million tons (1,320 million tons white and 928 000 tons yellow) is expected for the 2025/26 marketing season. The projected closing stock level by 30 April 2026 is estimated at 2,523 million tons (1,487 million tons white and 1,036 million tons yellow). The country will remain a net exporter of maize with a healthy surplus.

Trade balance

In the case of a product such as maize, millers (who are the main buyers of the maize crop) have the option of importing maize instead of buying locally produced maize. In a deregulated market, the decision whether to buy from domestic or foreign sources is influenced by, among other factors, transport costs, price and quality. When the product is imported, the exchange rate plays an important role in the actual rand price.

Depreciation in the value of the rand against relevant foreign currencies makes import products, such as maize, wheat and oilseeds more expensive in rand terms, thereby providing some protection for South African farmers and an incentive to increase production in the longer term. However, if South African producers are unable to meet the needs of the processors, or if processors are uncertain about local supplies, foreign sources can be considered.

South African producers, on the other hand, will consider the export market if local processors are unwilling to pay the prevailing local market price. In this manner, the market sets “natural” floor and ceiling prices, i.e., a price band within which such products trade. The price-setting mechanism for these crops is the JSE Security Exchange of South Africa’s Agricultural Products Division.

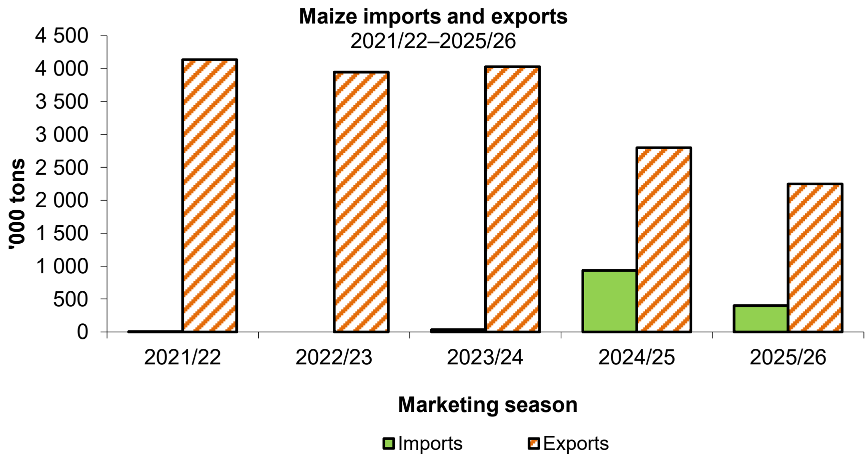
South Africa will remain a net exporter of maize for the 2025/26 marketing season as commercial production exceeds local consumption. Up to 3 October 2025, about 684 723 tons of maize, of which 291 272 tons were white maize and 393 451 tons yellow maize, had been exported since May—approximately 30,4% of the estimated total maize exports of 2,248 million tons.

For the 2025/26 marketing season, Botswana (26,6%, or 77 394 tons), Venezuela (22,7%, or 66 001 tons), Zimbabwe (18,8%, or 54 870 tons) and Lesotho (13,2%, or 38 495 tons) were the major markets for South Africa’s white maize exports.

The bulk of the yellow maize exports for the current season up to 3 October 2025 was characterised by exports to Vietnam (27,7%, or 109 120 tons), Taiwan (12,8%, or 50 255 tons), Republic of Korea (12,1%, or 47 633 tons), Eswatini (12,0%, or 47 376 tons) and Zimbabwe (11,2%, or 44 091 tons), amongst others.

Normally, the window of opportunity for exports of domestic maize lasts only until the end of October, when the harvesting of the US crop and US exports start.

The following graph shows the imports of maize to and exports from South Africa during the past five marketing seasons (May to April).



Maize tariff

The import tariff on maize is another domestic factor that could have an impact on the local price of maize. The import tariff on maize, as published in the *Government Gazette* of 8 December 2006, is zero.

World maize situation

According to the September 2025 report of the United States Foreign Agricultural Services, world maize production in 2025/26 (October to September) was forecast at 1,287 billion tons, which is 4,7% or 57,7 million tons more than the 1,229 billion tons produced during 2024/25. The US contributed 33,2% (427,1 million tons), China 22,9% (295,0 million tons), Brazil 10,2% (131,0 million tons) and the European Union 4,3% (55,3 million tons) to world production. The remaining 29,4% is made up by Argentina, India, Ukraine, Mexico and South Africa, among others.

Global consumption in 2025/26 was expected to be 1,289 billion tons—29,103 million tons more than in the previous year. Global ending stocks at the end of September 2026 were expected to be 281,4 million tons, which is 2,8 million tons or 1,0% less than in the previous year.

Marketing, information and research

No statutory levies are applicable, and the marketing of maize is free from statutory intervention.

The information function is performed by the Department of Agriculture through the Directorate: Statistics and Economic Analysis and Grain South Africa, which promote the interests of maize producers and SAGIS, a section 21 company funded by, among others, the maize industry.

Research is financed with income from the Maize Trust and performed by the Agricultural Research Council, the Council for Scientific and Industrial Research and other organisations.

Sorghum

Plantings and production

Sorghum is an indigenous crop to Africa and regarded as the fifth most important cereal in the world. There are two types of sorghum, namely, bitter and sweet sorghum cultivars. Preference is given to the sweet cultivars. Bitter sorghum is planted in areas where birds are a problem because it contains tannin, which leaves a bitter taste and consequently birds tend to avoid feeding on it.

Sorghum is mainly cultivated in low and erratic rainfall areas, especially in shallow and heavy clay soils. Sorghum is planted mainly between mid-October and mid-December. The rainfall pattern and other weather conditions of the season can determine the planting period in addition to the length of the growing season to a large extent.

During the last production season, an estimated 41 150 ha were planted to sorghum for commercial use, representing a decrease of 2,3% from the 42 100 ha planted for the 2024 season.

Sorghum for commercial purposes was produced mainly in Free State (31,4%), followed by Mpumalanga (30,5%), Limpopo (24,3%) and North West (10,7%). For the past five seasons until 2024, South Africa produced an average of 133 700 tons of sorghum per annum, which is relatively small compared to domestic maize and wheat production.

During the 2025 production season, sorghum contributed only approximately 0,5% to the gross value of field crops. The estimated average annual gross value of sorghum for the five years up to 2024/25 amounts to R519 million.

South Africa's 2024/25 planting season began slowly due to sporadic rainfall in October 2024 and a heatwave in November 2024. However, consistent and adequate rainfall across most of South Africa's summer grain producing regions by mid-December allowed producers to begin planting in earnest. After a dry and hot January, above-average rainfall in February and March across much of the summer rainfall production area significantly boosted plant growth and improved yields. Since most of South Africa's sorghum is rainfed, with less than 3 % under irrigation, sufficient rainfall during February and March—particularly during the grain-filling stage—directly enhances yield potential.

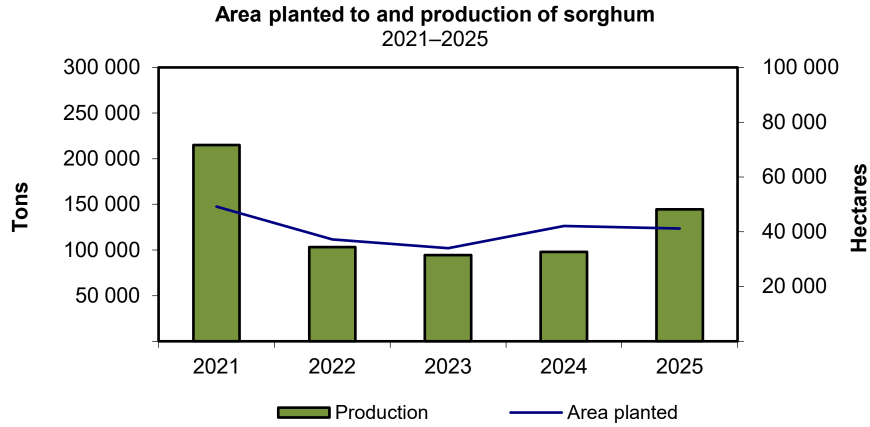
The commercial sorghum crop for the 2025 season is estimated at 144 665 tons, which is 47,6% more than the 98 000 tons of the previous season and 8,2% more than the five-year average production of 133 700 tons up to 2024. The yield for 2025 is estimated at 3,52 t/ha, which is 7,8% higher than the five-year average yield of 3,26 t/ha up to 2024.

Plantings, production and the yields of sorghum from 2021 to 2025 are as follows:

Season	2021	2022	2023	2024	2025
Plantings (ha)	49 200	37 200	34 000	42 100	41 150
Production (t)	215 000	103 140	94 360	98 000	144 665
Yield (t/ha)	4,37	2,77	2,78	2,33	3,52

Over the past decade, sorghum production in South Africa decreased as producers preferred to plant more profitable crops, like maize and oilseeds.

The following graph shows the area planted to and the production of sorghum in South Africa.



The non-commercial agricultural sector contributed approximately 20 696 tons, which was about 13,0% of the total sorghum production in South Africa during 2025.

Consumption

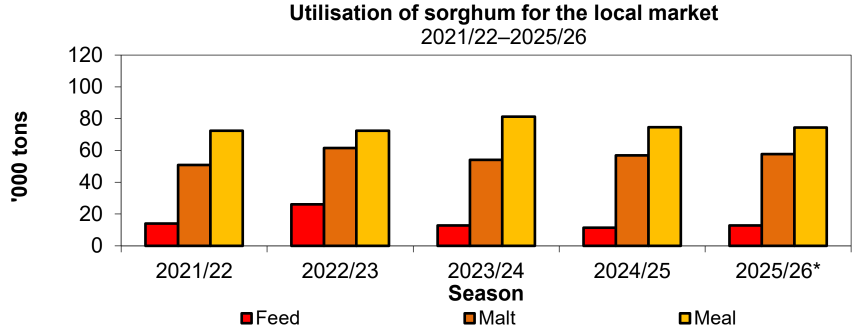
Sorghum, like other grains, has two basic markets that it serves, i.e., the human component and the animal feed component. Sorghum is consumed mainly in the human food market and, as in the case of maize, consumers tend to replace sorghum-based products with preferred products as the household income increases.

Expectations are that a total of 142 365 tons of sorghum will be available for local consumption during the 2025/26 marketing season (March to February), compared to 95 800 tons the previous season. The total domestic supply of 236 512 tons estimated for this season comprises of carry-over stocks as of 1 March 2025 amounting to 86 397 tons, plus producer deliveries of 142 365 tons at commercial structures, imports of 5 000 tons and a surplus of 2 750 tons.

The projected commercial utilisation of sorghum for the 2025/26 marketing season is approximately 146 220 tons, of which 132 300 tons are for human consumption (malt, meal and other uses) and 12 880 tons are for animal feed (poultry, pet, pigeon and ostrich feeds). Other uses (released to end-consumers, withdrawn by producers, etc.) amounts to 1 040 tons. Projected exports during the 2025/26 marketing season are 10 000 tons.

Considering the above, carry-out stocks on 28 February 2026 are expected to be about 80 292 tons.

The following graph depicts the utilisation of sorghum in South Africa (marketing seasons):



*Projection

Producer prices

Local producer prices of sorghum increased by 6,1%, from R3 843,54/t in 2024 to R4 077,45/t in the 2025 season.

Season	2021	2022	2023	2024	2025
	R/t				
Producer price	3 337,69	3 889,81	3 625,91	3 843,54	4 077,45

Imports and exports

During the 2025 season, up to 31 August 2025, South Africa imported a small amount from Ukraine, namely 24 tons.

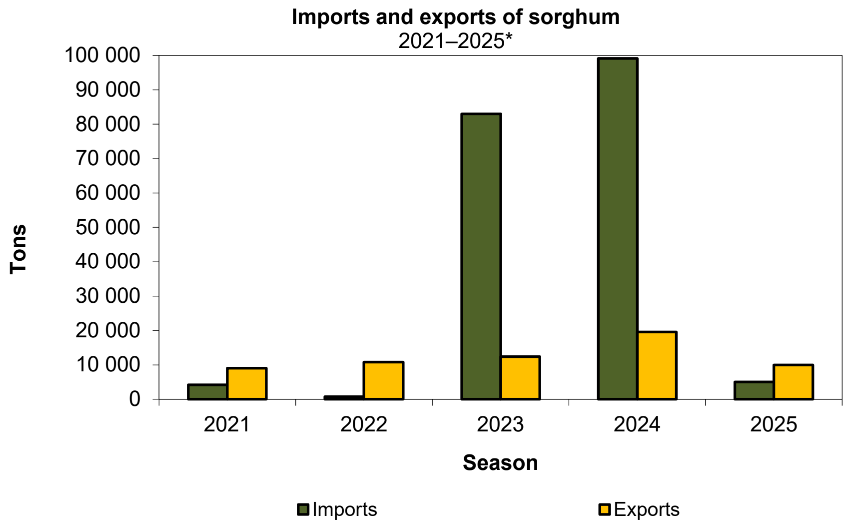
When it comes to exports, South Africa exports small quantities of sorghum to key markets in southern Africa, i.e., Botswana, Eswatini and Zimbabwe.

Imports and exports of sorghum from 2021 to 2025 are as follows:

Season	2021	2022	2023	2024	2025*
	Tons				
Imports	4 147	768	83 049	99 146	5 000
Exports	9 058	10 841	12 395	19 519	10 000

*Projection

Projected exports of sorghum for 2025 are 10 000 tons, which is 48,8% less than the 19 519 tons of 2024. In 2025, it is expected that 5 000 tons of sorghum will be imported.



**Projection*

Per capita intake

Indigenous cereals such as sorghum make only a small contribution to the starch-rich staple food complex in South Africa. The average estimated annual per capita intake (2021 to 2025) remains dominated by maize (71 kg/capita) and wheat (47 kg/capita), followed by potatoes (33 kg/capita) and rice (16 kg/capita), while sorghum intake was significantly lower at a mere 1 kg/capita.

World sorghum situation

According to the FAS/USDA report released in September 2025, world production of sorghum decreased by 1,2%, from 63,4 million tons in 2024 to 62,7 million tons in 2025. The contribution to world production by selected countries is as follows: the United States contributed 16,3% (10,2 million tons), Nigeria 11,0% (6,9 million tons), Brazil 7,8% (4,9 million tons), India 7,3% (4,6 million tons) and Mexico at 6,9% (4,3 million tons). The balance of 50,7% was made up by other remaining countries.

Cooperation

The Sorghum Forum, consisting of all the participating parties in the sorghum industry (producers, traders, silo owners, processors, labour, consumers and the ARC), meets regularly to discuss various issues relevant to the industry.

The Sorghum Trust provides funding for research on sorghum, the maintenance and improvement of quality standards and the storing and updating of information required by the sorghum industry.

SAGIS, an independent Section 21 company collects, collates and publishes market information on sorghum.

The Southern African Grain Laboratory, incorporated under Section 21 (Association Not for Gain), analyses the quality of grain.

The Crop Estimates Committee plays an important role in providing up-to-date market information on which important decisions and actions can be based.

On a national basis, the ARC is responsible for research and development in the agricultural sector.

Wheat

In terms of value of production, wheat is the fourth most important field crop produced in South Africa. In the 2024/25 season, this crop contributed approximately 8% to the gross value of field crops. The annual gross value of wheat amounts to R10 384 million, compared to R67 071 million for maize, which is the most important field crop.

Wheat is mainly planted between mid-April and mid-June in the winter rainfall area and between mid-May and the end of July in the summer rainfall area. The crop is harvested from November to January. Most of the wheat produced in South Africa is bread wheat, with small quantities of durum wheat being produced in certain areas.

Wheat is generally classed as "hard" or "soft". Hard wheat tends to have higher protein content than soft wheat and is used mainly for bread. Soft wheat, on the other hand, is more suitable for confectionery.

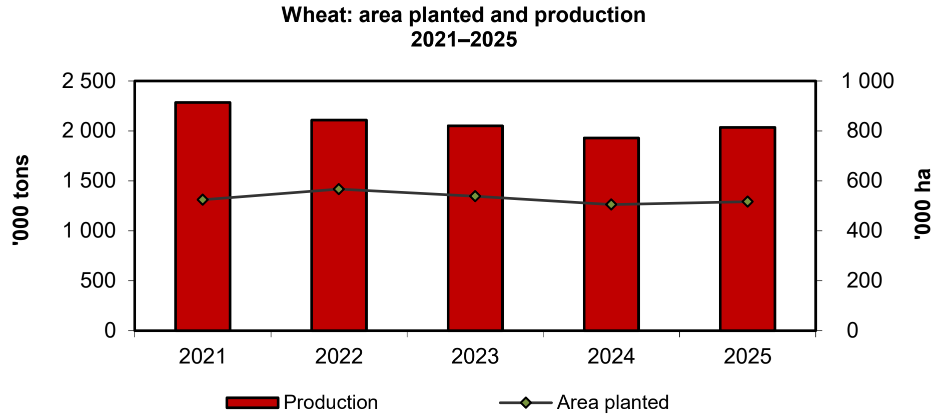
Areas planted and production

The estimated area planted to wheat for the 2025 season is 517 300 ha, which is 2,4% more than the 505 300 ha of the previous season. The area planted to wheat in the Western Cape is 363 000 ha (70%), which is 5 000 ha less than the 368 000 ha planted in the previous season. In the Free State, the area planted is 57 000 ha (11%) which is 8 000 ha more than the previous seasons' area of 49 000 ha.

Wheat is largely produced in the winter rainfall area of South Africa (i.e. the Western Cape province), under rainfed conditions. Therefore, weather in this province during the wheat production season plays a significant role in South Africa's total wheat crop. The production season (2025/26) in the Western Cape province started off with below-normal rainfall in May and June 2025. However, the dry period was followed by excessive rainfall in July 2025 that caused flooding in some areas but had minimal impact on the newly planted wheat crop. However, due to recent unfavourable weather conditions in some parts of the province, the wheat crop is set to experience a mild decline in the harvest this year compared to the previous (2024/25 season).

In other winter crop-growing regions of the country, the longer-than-usual summer rainfall period improved soil moisture and dam levels, all of which are beneficial to winter crops, especially in the irrigation regions. There are sufficient water supplies to support the crop throughout the season.

The areas planted to, and production of wheat is depicted in the following graph:



Based on conditions prevailing towards the end of September 2025, the expected commercial wheat crop for 2025 was 2,034 million tons, of which 1,053 million tons (52%) were from the Western Cape, 308 000 tons (15%) from the Northern Cape and 302 100 tons (15%) from the Free State provinces. The expected average yield was 3,93 t/ha. This is the third-highest yield ever recorded in South Africa.

Plantings, production and yields from 2021 to 2025 are as follows:

Season	2021	2022	2023	2024	2025
Plantings (ha)	523 500	566 800	537 950	505 300	517 300
Production (t)	2 285 000	2 110 000	2 050 000	1 930 000	2 034 380
Yield (t/ha)	4,36	3,72	3,81	3,82	3,93

Consumption

According to the Supply and Demand Estimates Committee (S&DEC), a total of 4,482 million tons of wheat (commercial) were available for local consumption during the 2024/25 marketing season (October to September). This comprised carry-over stocks as of 1 October 2024 of 749 838 tons, producer deliveries of 1,890 million tons, a surplus of 9 400 tons and imports of approximately 1,833 million tons.

The total demand for wheat for the 2024/25 marketing season is estimated at approximately 3,823 million tons, of which 259 000 tons were exported. Carry-out stocks as of 30 September 2025 are estimated to be 658 984 tons.

For the 2025/26 marketing season, the total supply of wheat is forecasted at 4,399 million tons (expected producer deliveries of 1,991 million tons, together with the carry-over stocks of 658 984 tons, a surplus of 8 500 tons and expected imports of 1,740 million tons).

The demand for wheat (exports included) is estimated at 3,833 million tons. Carry-out stocks at the end of September 2026 are expected to amount to 565 864 tons.

Imports

South Africa, a net importer of wheat, relies on imports from Australia, Lithuania and Poland, amongst other countries, to meet its domestic demand. It is expected that for the 2025/26 marketing season, 49% or 1,740 million tons of the wheat required for domestic consumption will have to be imported.

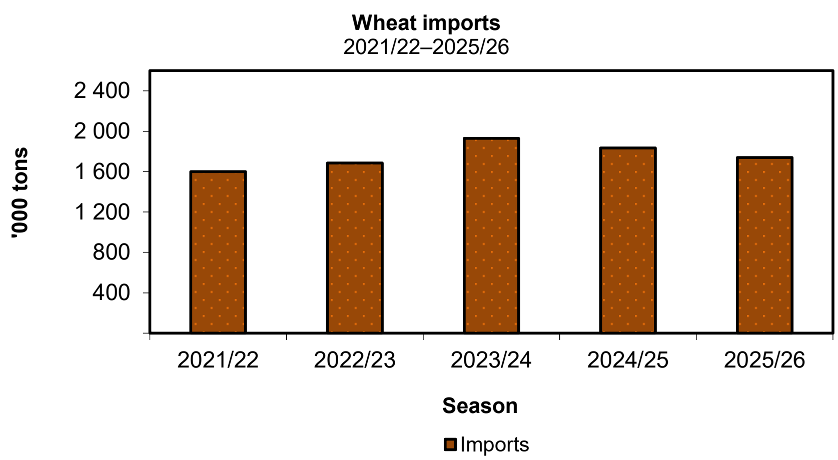
Wheat imports from 2021/22 to 2025/26 are as follows:

Season	**2021/22**	**2022/23**	**2023/24**	**2024/25**	**2025/26**
	Tons				
Imports	1 601 299	1 684 356	1 927 665	1 833 000	1 740 000

**Projection for the 2025/26 marketing season*

Source: SAGIS

The following graph shows the imports of wheat during the past five seasons (October to September).



There are mainly two factors that affect local wheat prices—the value of the rand against the dollar and international prices. The average producer price of wheat is expected to increase by 10,8%, from R5 371,02/ton in 2024/25 to R5 950,00/ton in 2025/26.

The average producer prices of wheat from 2021/22 to 2025/26 are as follows:

Season	**2021/22**	**2022/23**	**2023/24**	**2024/25**	**2025/26**
	R/ton				
Producer price	5 193,31	6 333,49	5 417,42	5 371,02	5 950,00

**Projection for the 2025/26 marketing season*

Marketing

The South African wheat market was deregulated on 1 November 1997 and wheat can therefore be traded freely. The only government intervention in the market is the tariff on wheat imports. On 11 July 2025, a new wheat tariff (R851, 50/ton) was published in the *Government Gazette.*

World wheat situation

According to the September 2025 report of the United States Foreign Agricultural Services, the global wheat production in 2025/26 is projected at 816,2 million tons, up by 1,9% or 15,3 million tons from the 2024/25 record. Global production in 2025/26 is raised to a new record driven supported by larger harvests in the European Union and India.

According to expectations, the European Union would contribute 17,2% (140,1 million tons), China 17,2% (140,0 million tons), India 14,4% (117,5 million tons) and Russia 10,4% (85,0 million tons) to world production during 2025/26. The balance of 40,8% is made up by the US, Canada, Australia and Pakistan, among others.

Global consumption is expected to be 814,6 million tons during 2025/26—5,4 million tons more than the previous year. Global ending stocks are expected to increase to 264,1 million tons by the end of June 2026, which is 1,6 million tons or 0,6% more than the previous year.

Research and information

The Winter Grains Trust is responsible for the allocation of funding and appraisal of relevant research projects in the winter grains industry. Since 1998, statutory levies on sales of winter cereals have been used to finance the Winter Grains Trust.

The ARC-Small Grains in Bethlehem conducts research on wheat and other winter grains.

The South African Grain Information Service (SAGIS), a Section 21 company funded by, among others, the wheat industry, administers the information function for the wheat industry.

Accurate crop forecasts and estimates also play an important role by providing up-to-date information upon which important decisions and measures can be based. The crop estimates are a result of the collated inputs

Malting Barley

Plantings and production

Barley is one of the most important grain crops in South Africa, surpassed only by wheat and maize and is, following wheat, the most important small grain type.

The cultivation area for barley under dryland conditions is at present restricted to a very specific region, namely, the Southern Cape, which stretches from Bot River in the west to Heidelberg in the east. It would not be economically viable to cultivate barley on dryland in an area that does not receive 350 mm of well-distributed rainfall during the growing season (April to October). At present, five varieties are recommended for barley production in the Southern Cape, viz., SabbiErica, SabbiNemesia, Disa, Agulhas and Hessekwa.

The concentration of the production of a relatively minor commodity, for instance barley, in a specific area has various advantages, e.g., it facilitates transport, storage, control, extension and research, which also implies cost advantages.

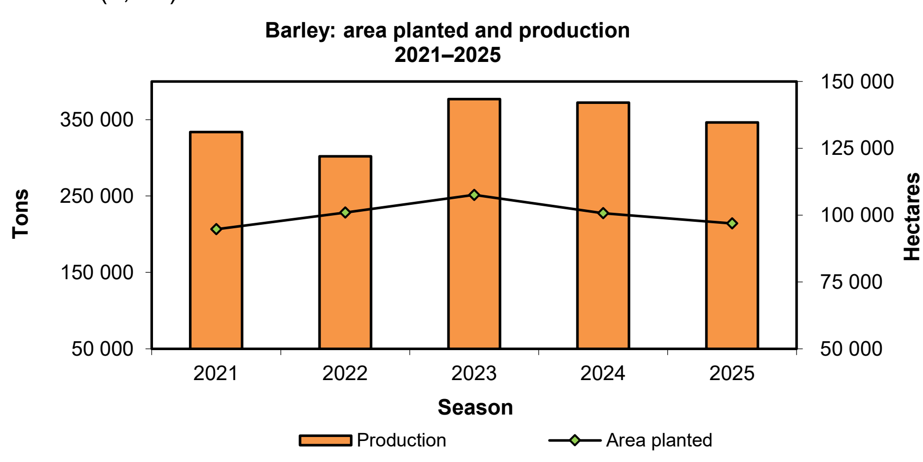
However, because of the risk of unpredictable weather conditions in the Southern Cape, barley production has also been introduced to the cooler central irrigation areas in Northern Cape. There are also farmers in other areas of South Africa, such as North West, Limpopo and Free State, who plant small quantities of barley under irrigation.

Barley under irrigation has a higher yield and is more stable than in the Southern Cape, where the crop is dependent on rainfall.

Barley is planted over a relatively short period of time (from three weeks in certain areas to five weeks in others). The earlier plantings generally have a higher yield potential. This results in greater yield increases with disease and pest control programmes in earlier plantings. Barley planted later than the optimum planting period is therefore at greater risk in terms of both yield and quality.

Barley is mainly used to produce malt (for brewing beer), animal feed and pearl barley. However, the Crop Estimates Committee's barley estimates only involve barley, therefore excluding barley for animal feed.

The area planted to barley for the 2025 season is estimated at 96 950 ha. This is a decrease of 3,7% or 3 750 ha from the plantings of 100 700 ha during 2024. It is also 11,2% or 12 194 ha less than the five-year average of 109 144 ha planted up to 2024. Of the 96 950 ha planted in 2025, 86 000 ha (88,7%) are in Western Cape, 7 200 ha (7,2%) are in Northern Cape, 1 800 ha (1,9%) are in Limpopo, 1 400 ha (1,4%) are in North West and only 550 ha (0,6%) are in Free State.



A total crop of 346 430 tons of barley is expected for the 2025 season. This is a decrease of 6,9% more than the production of 372 250 tons in the previous season and 12,2% or 48 220 tons less than the average production of 394 650 tons per annum over the five years up to 2024. The expected average yield for 2025 is 3,6 t/ha.

Plantings, production and yield of barley from 2021 to 2025 are as follows:

Season	2021	2022	2023	2024	2025
Plantings (ha)	94 730	101 000	107 600	100 700	96 950
Production (t)	334 000	302 000	377 000	372 250	346 430
Yield (t/ha)	3,53	2,99	3,50	3,70	3,57

Consumption

The processing of barley into malt is done mainly in Caledon in the Southern Cape, but also in Alrode near Johannesburg. Malt barley is all about taste and is mainly used to flavour beer. It is also used around the world in many foods.

The total supply of barley for the 2024/25 marketing season (October to September) is estimated at 657 100 tons (imports included). Carry-over stocks as of 1 October 2024 amounted to 168 800 tons. Production for the 2024/25 season was 372 300 tons, while 116 000 tons were imported.

For the 2024/25 marketing season, the total demand for barley was estimated at 447 100 tons, including 48 000 tons of exports. Carry-out stocks of 30 September 2025 were 210 000 tons.

For the 2025/26 marketing season, the total supply of barley is expected to be 672 400 tons, comprising the expected crop of about 346 400 tons, carry-over stocks of 210 3000 tons and 116 000 tons of imports are expected. The domestic demand is estimated at 465 100 tons, including 48 000 tons of exports. Carry-out stocks at the end of September 2025 are expected to amount to 207 300 tons.

Producer prices and value of the crop

The average producer price of barley decreased by 23,6%, from R3 406,56 R/ton in 2023 to R2 603,13 R/ton in 2024.

The average producer prices of barley from 2020 to 2024 are estimated as follows:

Season	**2020**	**2021**	**2022**	**2023**	**2024**
	R/ton				
Producer price	2 515,69	2 795,48	4 524,88	3 406,56	2 603,13

The average annual gross value of barley for the past five years up to 2024/25 amounts to R1 207 million, compared to the R11 447million of wheat and R58 352 million of maize.

Marketing

Barley is different from most, if not all, other agricultural commodities as there is only one major buyer in South Africa, namely, South African Breweries Maltings (SABM), which supplies its major shareholder, South African Breweries Limited (SAB) with malted barley. Barley producers have a guaranteed market (there is a written commitment to source locally) and fixed-price forward contracts. The malt barley industry is significant in South Africa's national economy, with barley playing a crucial role in the crop rotation systems used by farmers.

Imports

Variability in rainfall can cause wide fluctuations in barley quality and yields in South Africa. Whenever the local crop has fallen short of requirements, South Africa depends on imports from Australia, France and the Ukraine.

Barley and malt imports from 2020/21 to 2024/25 are as follows:

Season	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25**
	Tons				
Barley	0	0	75 000	109 500	116 000
Malt	126 752	150 386	207 849	915 513	*

Source: SAGIS; customs & excise

World barley situation

Global production in the 2024/25 marketing season is mainly driven by the larger crops in the European Union (53,23 million tons) and Russia (17,50 million tons).

According to the December 2024 report of the United States Foreign Agricultural Services, world barley production is estimated at 143,33 million tons for the 2024/25 marketing year, while global consumption is expected to be 146,25 million tons. Global ending stocks at the end of June are expected to be 17,94 million tons.

Research and information

The ARC-Small Grain Institute (SGI) in Bethlehem and the South African Barley Breeding Institute (Sabbi) near Caledon conducts research on and breeding of barley in South Africa, which is financed by statutory levies on barley sales**.**

The ARC-SGI is one of the crop institutes of the ARC which has, under the Agricultural Research Act, 1990 (Act No. 86 of 1990), the mandate to perform research, development and transfer of technology within the RSA to the advantage of all agricultural and agriculture-related industries and therefore improve the quality of life of all South Africans.

On the other hand, Sabbi's Research and Development mission is to ensure sustainable barley production for the benefit of the SAB, SABM and the producer through innovative research and development. Producers need better quality, higher yields, and more resistant varieties in addition to increased knowledge of enhanced agricultural production practices to be more competitive with global competitors.

The SAGIS, a Section 21 company funded by, among others, the barley industry, administers the information function for the barley industry.

Sunflower seed

Sunflower seed can be planted from the beginning of November to the end of December in the eastern parts of the production areas and up to the middle of January in the western parts. Sunflowers grow best when planted in midsummer to ensure that less moisture is lost from the soil during the crucial growing phases. Compared to other crops, sunflower performs well under dry conditions. This is probably the main reason for the crop's popularity in the marginal production areas of South Africa. A close link exists between the area planted to maize and the area planted to sunflower seed because farmers can easily switch to sunflower if the normal period for maize planting has passed.

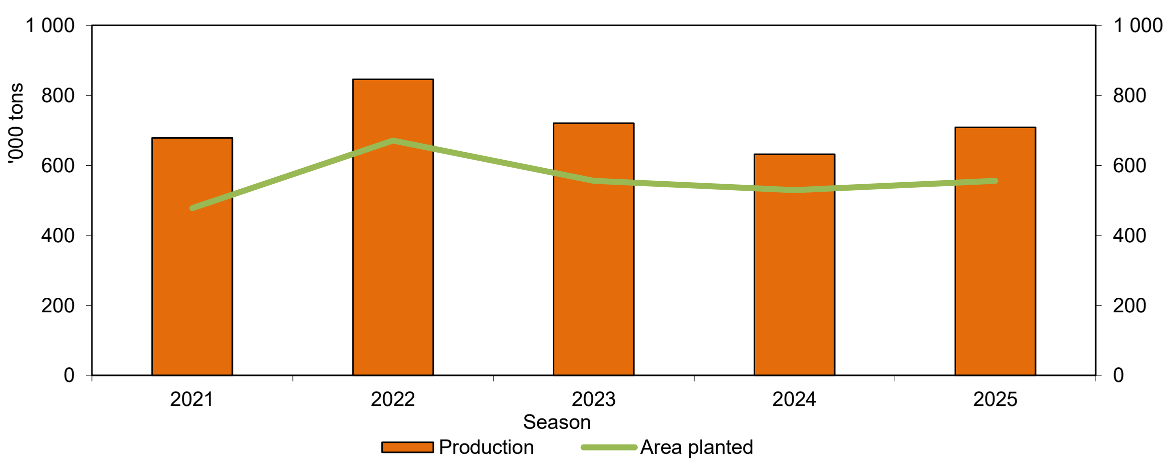
Plantings and production

During the 2025 production season, the bulk of the crop was produced in Free State (47,6%), North West (35,1%) and Limpopo (16,2%).

The contribution of sunflower seed to the gross value of field crops during the 2024/25 season is approximately 4,6%, compared to 51,2% of maize, the largest contributor to field crops. The average annual estimated gross value of sunflower seed from 2019/20 to 2023/24 amounts to R6 104 million compared to the R15 427 million of maize.

The annual plantings of sunflower show remarkable variation over the past two decades, varying from 316 350 ha planted in 2007, a high of 718 500 ha planted in 2016, and 555 700 ha in 2025. The area planted to sunflower seed for commercial use during the 2025 production season increased by 5,1% to 555 700 ha, from an estimated 529 000 ha the previous season. This is also 1,6% more than the five-year average of 546 700 ha up to 2023/24. The increase in the 2025 sunflower plantings can mainly be attributed to the decrease in maize plantings due to unfavourable weather conditions during November up to mid-December 2024. The

Area planted to and production of commercial sunflower seed
2021–2025



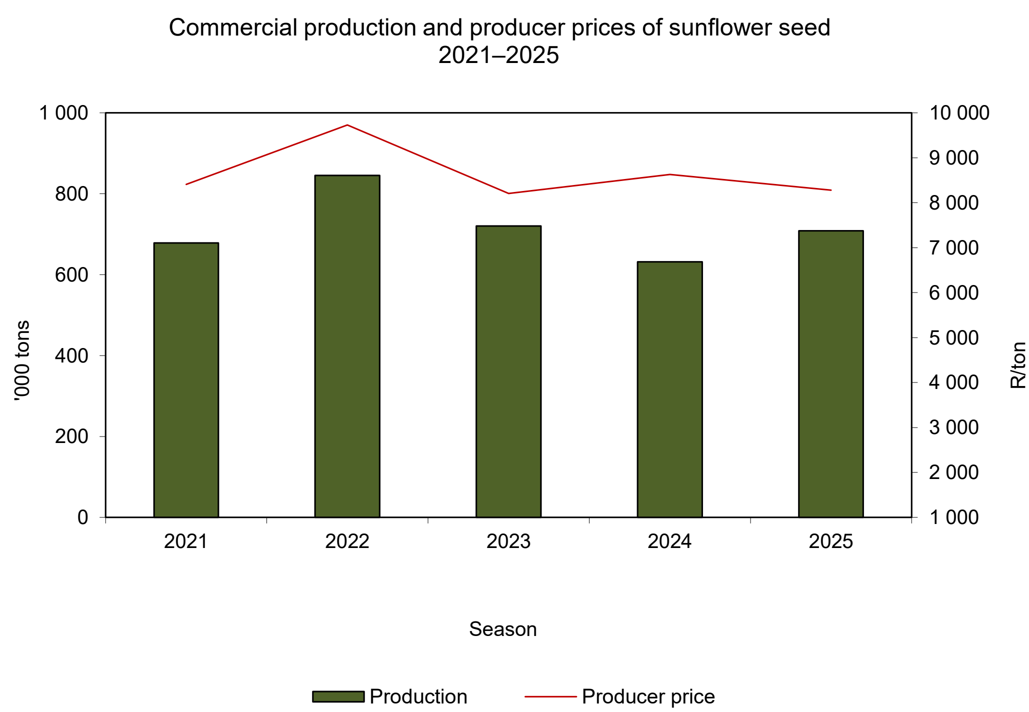
area allocated to sunflower is also influenced by intra-seasonal climatic variability, particularly rainfall patterns during the optimal planting periods for maize and soybeans. Given that sunflower has a later planting window compared to these crops, delayed or suboptimal rainfall during the maize and soybean planting window may prompt producers to reallocate resources toward sunflower production as a strategic alternative in affected years. However, in the western regions its resilience in dry conditions continues to make it a key alternative for producers to manage weather related risks.

Commercial sunflower seed production during 2025 is approximately 708 300 tons, which is 12,1% more than the previous season (632 000 tons) and 3,3% less than the average of 732 810 tons for the previous five years. The increase in production is due to beneficial rains received during the critical pollination and grain-filling stages that boosted yields. The average yield for 2025 is approximately 1,27 t/ha, which is 6,7% more than 1,19 t/ha during the previous season and 5,2% less the five-year average of 1,34 t/ha up to 2024.

Non-commercial agriculture contributed an estimated 28 122 tons (3,8%) to the total sunflower seed production in South Africa during 2025.

Commercial plantings, production and yields of sunflower seed from 2021 to 2025 are as follows:

Season	**2021**	**2022**	**2023**	**2024**	**2025**
Plantings (ha)	477 800	670 700	555 700	529 000	555 700
Production (t)	678 000	845 550	720 000	632 000	708 300
Yield (t/ha)	1,42	1,26	1,30	1,19	1,27



Producer prices

The average producer price decreased by 4,0%, from R8 626,52/ton in 2024 to R8 281,24/ton in 2025. In terms of sunflower seed prices, the interaction with the global market is different as South Africa is a net importer of this commodity. This means the domestic market tends to be sensitive to global developments.

South Africa's agricultural industries operate in a relatively open-market environment, where local and international factors have an impact on domestic oilseed prices. Local oilseed prices will continue to move with export parity levels for the rest of the season and will be influenced by the uncertainty created by global trade disruptions caused by variations in the international price of oilseeds, planting progress in the United States, local productions, export progress and South Africa's volatile exchange rate.

The average producer prices of sunflower seed from 2021 to 2025 are as follows:

Season	**2021**	**2022**	**2023**	**2024**	**2025**
	R/ton				
Producer price	R8 409	R9 730	R8 206	R8 626	R8 281

Consumption

The National Agricultural Marketing Council (NAMC) established the South African Grain and Oilseeds Supply and Demand Estimates Committee (S&DEC) in 2013. This committee was formed to address the specific need for accurate information pertaining to the supply of and demand for the major grain and oilseed crops, namely, white and yellow maize, wheat, sorghum, sunflower seed and soya beans.

The sunflower seed marketing season in South Africa commences on 1 March and ends on 28 February. The estimated sunflower seed crop of 708 300 tons for the 2025/26 marketing season, together with carry-over stocks of about 72 789 tons on 1 March 2025, a surplus of 3 000 tons, and projected imports of 2 800 tons, leaves the domestic supply of commercial seed at an estimated 786 889 tons for the season.

In South Africa, sunflower seed is used almost exclusively (an estimated 706 000 tons in 2025) for oil and oilcake production. The estimated domestic demand of seed for the 2024/25 marketing year is approximately 733 050 tons, including 7 700 tons for human and animal consumption. Other consumption is estimated at 3 850 tons. The projected exports during 2024 are 15 500 tons. Carry-out stocks on 28 February 2026 are expected to be approximately 53 839 tons.

Trade

Regarding exports, phytosanitary requirements and quality standards must be adhered to and a Perishable Products Export Control Board (PPECB) certificate must be obtained. For 2025, South African imports were mainly from Botswana and Egypt. On the other hand, South African exports were mainly to Zimbabwe and Botswana.

Imports and exports of sunflower seed from 2021 to 2025.

Year	2021	2022	2023	2024	2025*
	Tons				
Imports	1 256	6 805	12 793	1 423	2 800
Exports	217	170	68	196	15 500

**Projection*

International overview

The September 2025 report by the United States of Foreign Agricultural Services (FAS) indicated that the global harvested area increased by 1,5% (410 000 ha) in 2024/25 compared to 2023/24, to a figure of 28,2 million ha.

World output of sunflower seed decreased by 3,5 million tons or 6,3% from 56,0 million tons in 2023/24 to 52,4 million tons in 2024/25. It is important to note that Russia and Ukraine, as two of the main sunflower seed exporting countries in the world, are expecting crops of 16,9 million tons and 13,0 million tons, respectively, in 2024/25. This represents a decrease of 1,2% or 200 000 tons in Russia and a decrease of 16,1% or 2,5 million tons in the case of Ukraine.

The FAS September 2025 report projected that global sunflower seed production will reach 55,3 million tons in 2025/26—an increase of 5,4% or 2,8 million tons compared to 52,4 million tons during 2024/25. Sunflower seed production in the Ukraine is expected to decrease by 300 000 tons or 2,3% to 12,7 million tons. Sunflower seed production in Russia is expected to increase by 2,1 million tons or 12,4% to 19,0 million tons.

Marketing, information and research

No statutory levies are applicable, and the marketing of oilseeds is free from statutory intervention.

The information function is performed by the Department of Agriculture, Land Reform and Rural Development, through the Directorate: Statistics and Economic Analysis; Grain South Africa, which promotes the interests of oilseed producers and the South African Grain Information Service (SAGIS), a Section 21 company funded by, among others, the oilseeds industry.

Research is financed with income from the Oilseeds Trust and performed by the ARC, the CSIR and other organisations.

Soya beans

Various soya bean cultivars have adapted quite well to South African conditions. Depending on prevailing local conditions, soya beans are usually planted in November and December. On ripening, the leaves turn yellow and the seeds' moisture content decreases – from about 65% to 14% within 14 days – provided hot, dry weather occur.

It is a relatively difficult crop to grow and not all areas are suitable for soya bean cultivation. These plants thrive in warm, fertile, clayish soil and are mainly cultivated under dryland conditions.

Soya beans contributed approximately 14,9% to the gross value of field crops during 2024/25. The estimated average annual gross value of soya beans for the past five seasons up to 2023/24 amounts to R15 427 million.

Plantings and production

The plantings of soya beans ranged between 150 000 ha and 1,151 million ha over the past 20 years.

During the 2025 season, soya beans were grown primarily in Free State (565 000 ha or 49,1%), Mpumalanga (315 000 ha or 27,4%), North West (148 000 ha or 12,9%), Gauteng (52 000 ha or 4,5%) and KwaZulu-Natal (47 000 ha or 4,1%). The main factors contributing to this positive trend in soya bean plantings include investments in new oilseed processing plants, an improved affinity by farmers to use soya beans as a rotational crop with maize and favourable soya bean prices.

During the 2025 season, an estimated 1 150 500 ha were planted for commercial use, compared to an estimated 1 151 000 ha the previous season. This represents an increase of 0,04% and is 21,0% more than the five-year average of 951 240 ha up to 2024. These record plantings for 2025 also surpassed the yellow maize area planted (997 000 ha) for the third consecutive season.

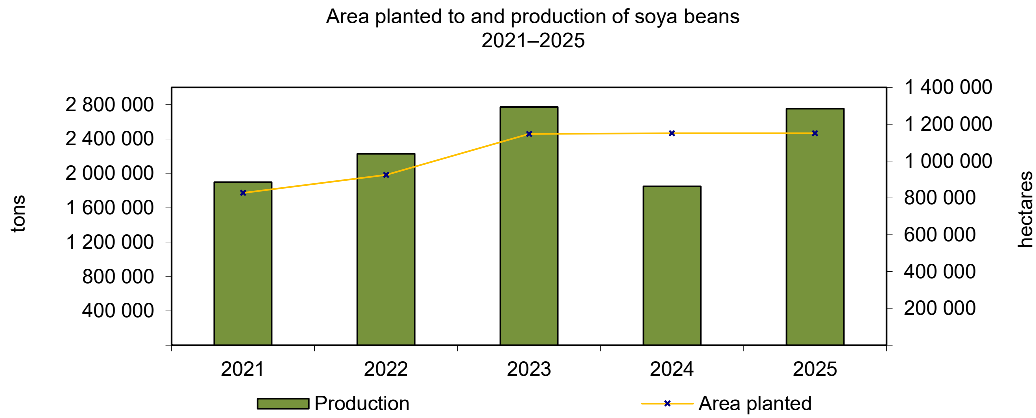
South Africa's 2024/25 summer rainfall production season started off slowly with sporadic showers during October 2024 and a heatwave in November 2024, affecting the oilseed planting progress. However, in mid-December, respectable and continued rainfall over most parts of South Africa's oilseed production areas finally started enabling producers to plant. After a dry and hot January, above-average rainfall was recorded in February and March 2025 over most parts of the summer rainfall production area, boosting plant growth and pushing up anticipated yields.

The crop of an estimated 2,753 million tons in 2025 represents an increase of 49,0% from the 2024 crop of 1,848 million tons. It is also 37,8% more than the average of 1,998 million tons for the five years up to 2024. The average yield of 2,39 t/ha is 48,9% less than the 1,61 t/ha of the previous season.

South African producers benefit from international seed technology and investments into local multiplication of oilseed varieties that support yield gains over time. In addition, producers pay a statutory seed levy to the South African Cultivar and Technology Agency (SACTA) on an annual basis. SACTA was formed as a non-profit company to guarantee that breeding and technology levies are paid to seed breeding companies and plant breeder rights holders, ensuring continuous research and cultivar development.

Plantings, production and yields of soya beans from 2021 to 2025 are as follows:

Season	**2021**	**2022**	**2023**	**2024**	**2025**
Plantings (ha)	827 100	925 300	1 148 300	1 150 500	1 151 000
Production (t)	1 897 000	2 230 000	2 770 000	1 848 000	2 753 125
Yield (t/ha)	2,29	2,41	2,41	1,61	2,39



Producer prices

The international market mainly influences the local soya bean market. Local soya beans prices are mainly determined by import and export parity prices, as well as the derived price of oil and oil cake prices. The oilseeds market is very complex in this regard as the products that are obtained through the processing of soya beans, namely, the oil and oilcake, can be imported separately, thereby adding a third factor to the price formation mechanism of oilseeds, namely the derived price. The derived price is the calculated price that considers the value of the oil and oilcake imports.

The average local producer price of soya beans for 2025 is approximately R7 162/ton, which is 15,9% less than the price for 2024. Local soya bean prices are, among other factors, influenced by international soya bean and vegetable oil prices. Other factors include the level of soya bean production in South America, the demand for imported soya in China, marine freight rates and the rand/dollar exchange rate.

The average producer prices of soya beans from 2021 to 2025 are as follows:

Year	**2021**	**2022**	**2023**	**2024**	**2025**
	R/ton				
Producer price	7 221	7 207	7 530	8 516	7 162

Consumption

The National Agricultural Marketing Council established the South African Grain and Oilseeds Supply and Demand Estimates Committee (S&DEC) in 2013 after an extensive consultation process. The committee was formed to address the specific need for accurate information that relates to grain imports and exports to be made available timely to all stakeholders. In addition, there was also a need for the release of official supply and demand figures for the major grain and oilseed crops, namely, white and yellow maize, wheat, sorghum, sunflower seed and soya beans.

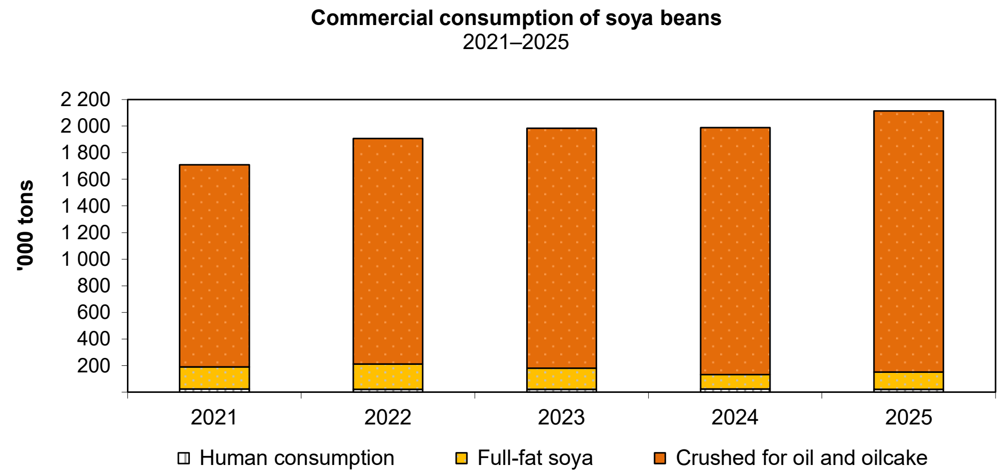
The soya bean marketing season in South Africa commences on 1 March and ends on 28 February. An estimated total of 2,868 million tons of soya beans were available for utilisation during the 2025 marketing season. It comprises carry-over stocks on 1 March 2025 amounting to 140 704 tons, the estimated production (excluding retentions by producers) of 2,709 million tons, a surplus of 6 000 tons and projected imports of 12 300 tons.

In South Africa, soya beans are mainly used for animal feed. The local demand for soya bean meal, as the preferred source of protein for animal feed, has increased in correlation with the increase in poultry production in South Africa and more than doubled over the past decade. As local production of soya bean meal was limited in the past, almost all of the local consumption had to be imported. With the expansion of the local soya bean crushing industry and soya bean production, imports as a percentage of local consumption are showing a decreasing trend.

The local commercial consumption of soya beans for 2025 is projected at 2,127 million tons—128 000 tons for feed (full-fat soya), 1,965 million tons for oil and oilcake and 22 000 tons for human consumption. Other consumption is estimated at 11 600 tons.

The projected exports during 2025 are 300 000 tons. Carry-over stocks on 28 February 2026 are expected to be approximately 441 529 tons.

The following graph illustrates the commercial consumption of soya beans.



Trade

During the first eight months of 2025, South African exports of soya beans were mainly to Zimbabwe and Eswatini (Swaziland). South African imports for the mentioned period were mainly from the United States (USA) and Ukraine.

The imports and exports of soya beans from 2021 to 2025 are as follows:

Year	**2021**	**2022**	**2023**	**2024**	**2025***
	Tons				
Imports	13 400	4 200	3 500	154 300	12 300
Exports	42 300	277 500	597 000	150 200	300 000

**Projected*

International overview

According to the World Agricultural Supply and Demand Estimate (WASDE) report released in September 2025, world production of soya beans increased by 7,0%, from 396,4 million tons for the 2023/24 season to 424,2 million tons for 2024/25. The increase in world production can mainly be attributed to the larger expected crop in Brazil and the United States. Brazil contributed 39,8% (169,0 million tons) to world production and the United States 28,0% (118,8 million). However, for the same period, a decrease is projected for Argentina, where soya bean production is expected to decrease by 2,7 million tons to 50,9 million tons.

Outlook

South Africa's total oilseed processing capacity is estimated at 2,9 million tons and is derived from a combination of dedicated soya beans and sunflower seed processing facilities, as well as crushing plants with the ability to switch between soya beans and sunflower seed.

The September 2025 WASDE report projected the global production of soya beans for the 2025/26 marketing season at 425,9 million tons—an increase of 0,4% or 1,7 million tons from 424,2 million tons in 2024/25. This increase in world production can mainly be attributed to the larger expected crop of Brazil with an increase of 6,0 million tons to 175,0 million tons.

Research and information

Locally, the ARC, the CSIR and other organisations, financed by income from the Oil and Protein Seeds Development Trust, perform research on soya beans.

The information function is performed by the Department of Agriculture, through the Directorate: Statistics and Economic Analysis; Grain South Africa, which promotes the interests of oilseed producers and the South African Grain Information Service (SAGIS), a Section 21 company funded by, among others, the oilseeds industry. SAGIS collects, collates and publishes highly factual and reliable market information (stocks, imports, exports, producer deliveries and consumption) once a month. Since February 2018, SAGIS has started to report on weekly producer deliveries for soya beans and sunflower seed.

Accurate crop forecasts and estimates also play an important role by providing up-to-date information, upon which important decisions and measures can be based. The crop estimates are a result of the collated inputs of, and consensus reached by the various members of the Crop Estimates Committee.

Groundnuts

Plantings and production

The normal planting time for groundnuts is mid-October to mid-November. Groundnuts are a high value crop produced mainly in the north-western regions of South Africa, particularly the western and north-western parts of Free State, in North West and in Northern Cape. Groundnuts are also produced in Limpopo, KwaZulu-Natal and Mpumalanga, but to a lesser extent.

During the 2024/25 production season, 45,1% of the plantings were in Free State, 44,7% in North West, 6,4% in Northern Cape and 3,4% in Limpopo. The remaining 0,4% of plantings were in KwaZulu-Natal.

Groundnuts contributed approximately 0,4% to the gross value of local field crops in 2024/25, while the average annual gross value of groundnuts for the five years up to 2024/25 amounts to approximately R477,5 million.

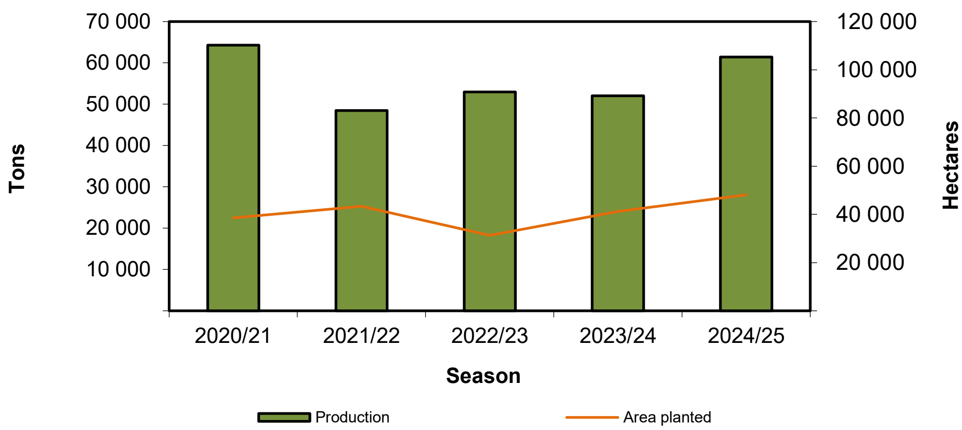
An estimated 48 125 ha were planted to groundnuts for commercial use, compared to 41 200 ha planted during 2023/24. This represents an increase of 16,8% and is 25,4% more than the average of 38 390 ha planted during the five years up to 2023/24.

An estimated commercial crop of 61 389 tons of groundnuts was produced during 2024/25. This represents an increase of 18,1% from the 2023/24 crop of 52 000 tons. The 2024/25 crop is 14,6% more than the five-year average of 53 576 tons up to 2023/24. The average yield for 2024/25 was 1,28 t/ha, which is 1,1% more than the 1,26 t/ha of the previous season and 8,6% less than the five-year average of 1,40 t/ha up to 2023/24.

Plantings, production and the yield of groundnuts from 2020/21 to 2024/25 are as follows:

Season	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25**
Plantings (ha)	38 550	43 400	31 300	41 200	48 125
Production (t)	64 300	48 500	53 000	52 000	61 389
Yield (t/ha)	1,67	1,12	1,69	1,26	1,28

Area planted to and production of groundnuts
2020/21–2024/25



Producer prices

Groundnuts are traditionally an export commodity and local prices are determined mainly by export parity.

The average producer prices of groundnuts from the 2021/22 to 2025/26 marketing seasons were as follows:

Season	**2021/22**	**2022/23**	**2023/24**	**2024/25**	**2025/26***
			R\t		
Producer price	7 831	7 862	7 871	7 898	7 668

**Preliminary*

The average producer price for groundnuts shows a decrease of 2,9%, from R7 898/ton in 2024/25 to R7 668/ton in 2025/26.

Trade balance

The SA Groundnut Forum has requested all role players to comply with legally prescribed standards for permissible levels of chemical residue on groundnuts destined for export to maintain the market share of South African groundnuts, especially in the European Union and Japan. These regulations are based on the principle of Critical Good Agricultural Practices (CGAP).

South Africa generally applies an import duty of 10,0% ad valorem on imports of groundnuts. However, imports of groundnuts from Member Countries of the following regional structures may enter South Africa free of duty: SACU, the European Union and SADC. This is due to free trade agreements that exist between South Africa and the abovementioned regional structures.

Imports of groundnuts to and exports from South Africa during the five marketing seasons (March to February) up to 2025/26 are as follows:

Season	**2021/22**	**2022/23**	**2023/24**	**2024/25**	**2025/26***
	Tons				
Imports	23 900	12 200	23 700	24 500	23 500
Exports	6 800	8 400	6 100	8 700	8 500

**Projections*

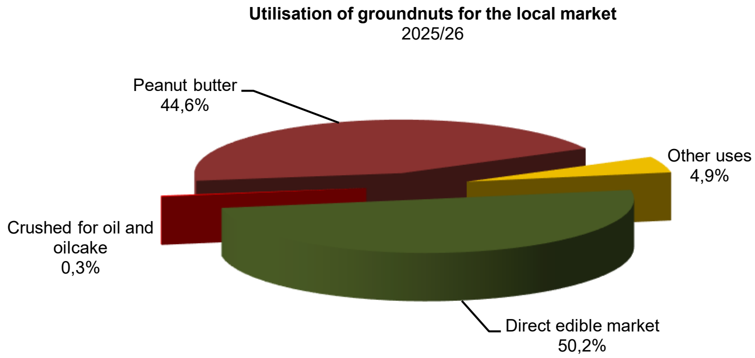
It is expected that the South African groundnuts imports could decrease by 4,1%, from 24 500 tons in 2024/25 to 23 500 tons in the 2025/26 marketing season. During the first six months of the abovementioned marketing season, South African imports of groundnuts were mainly from Brazil, Namibia, India, Argentina and China.

The expected groundnuts exports also show a decrease of 2,3%, from 8 700 tons in 2024/25 to 8 500 tons in 2025/26. The major export destinations for South African groundnuts are Mozambique, the Netherlands, Belgium, Japan and Zimbabwe.

Consumption

An estimated 99 972 tons of groundnuts will be available for utilisation during the 2025/26 marketing season. Carry-over stocks on 1 March 2025 amounted to 15 083 tons and the estimated production is 61 389 tons. Projected imports amount to approximately 23 500 tons.

In South Africa, groundnuts are mainly consumed in two forms, i.e., as edible nuts and processed peanut butter. The local commercial consumption of groundnuts for 2025/26 is estimated at 69 950 tons—250 tons for oil and oilcake, 32 000 tons for peanut butter, 36 000 tons for the direct edible market and 1 700 tons as pods. Other consumption (released to end consumers, seed, etc.) amounts to 3 500 tons. The projected exports during 2025 are 8 500 tons. Carry-over stocks on 28 February 2026 are expected to be approximately 18 022 tons.



The per capita consumption for the 2025/26 marketing season is projected at 0,70 kg, which is 20,7% more than the 0,58 kg in the previous season.

International overview

The world production of groundnuts shows an increase of 4,8% (2,39 million tons), from 49,85 million tons in 2023/24 to 52,24 million tons in 2024/25. This increase can mainly be attributed to the 58,9% (0,43 million tons) increase in Brazil's groundnut production, from 0,73 million tons in 2023/24 to 1,16 million tons in 2024/25, followed by Sudan with an increase of 20,9% (0,29 million tons), from 1,39 million tons to 1,68 million tons, followed by Argentina with an increase of 21,6% (0,32 million tons) from 1,48 million tons to 1,80 million tons, followed by India with an increase of 18,3% (1,10 million tons) from 6,00 million tons to 7,10 million tons and the United States with an increase of 9,7% (0,26 million tons) from 2,67 million tons to 2,93 million tons.

The world production of groundnuts is expected to decrease by 1,0% (0,50 million tons), from 52,24 million tons in 2024/25 to 51,74 million tons in 2025/26. The decrease can mainly be attributed to the expected decreases in Sudan, Argentina, Mali and Ghana's production of groundnuts.

Sudan's production of groundnuts is expected to decrease by 40,5% or 0,68 million tons, followed by Argentina with an expected decrease of 24,4% or 0,44 million tons, Mali with an expected decrease of 8,0% or 0,04 million tons and Ghana with an expected decrease of 4,8% or 0,03 million tons in 2025/26.

Canola

Canola was developed in the early 1970s using traditional plant breeding techniques by Canadian plant breeders to remove the anti-nutritional components (erucic acid and glucosinolates) from rapeseed to assure its safety for human and animal consumption. The canola plant produces seeds with a very low level of saturated fat.

Local and international investors in the oilseed-crushing sector are boosting South Africa's capacity to process local oilseed crops such as soya beans, canola and sunflower seed. This forms part of efforts to meet growing domestic demand for proteins and to be less dependent on imports of these crops.

Almost the entire canola crop in South Africa is produced in Western Cape, particularly in the Southern Cape. Over time, there were also farmers in all other provinces of South Africa, who started to plant small quantities of canola.

Plantings and production

The estimated area planted to canola increased by 5,3%, from 165 750 ha in 2024 to 174 515 ha in 2025. The canola crop production is expected (September 2025) to increase by 7,3%, from 290 400 tons in 2024 to 311 641 tons in 2025. This is the largest expected canola crop ever recorded for South Africa.

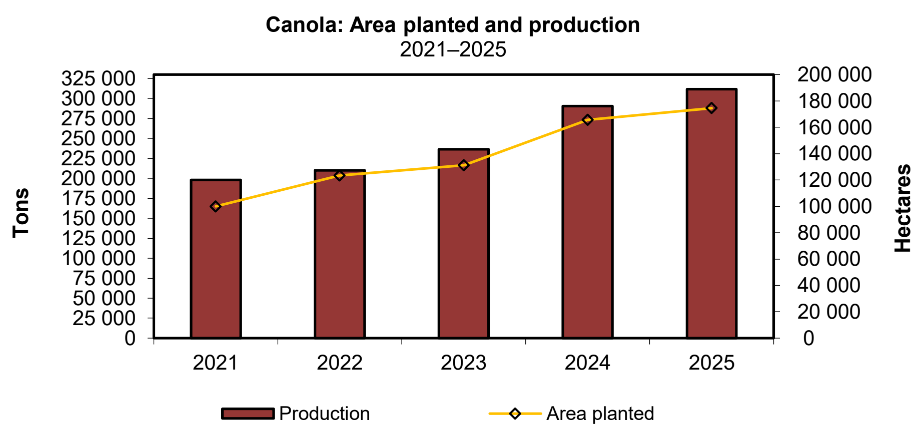
The start of the 2025 production season in the Western Cape province began with below-normal rainfall in May and June 2025. However, the dry period was followed by excessive rainfall in July 2025. During September 2025, relatively dry conditions occurred in some parts of the province. In addition, problems with canola arose in the Western Cape, as reports of snail infestations led to replanting in several areas. Despite the replanting of canola and drier conditions, production remained positive.

The expected average yield increased by 2,3%, from 1,75 t/ha in 2024 to 1,79 t/ha in 2025.

Estimated plantings, production and yields of canola from 2021 to 2025 are as follows:

Season	**2021**	**2022**	**2023**	**2024**	**2025**
Plantings (ha)	100 000	123 510	131 200	165 750	174 515
Production (t)	198 100	210 000	236 300	290 400	311 641
Yield (t/ha)	1,98	1,70	1,80	1,75	1,79

The areas planted to, and production of canola is depicted in the following graph.



The planting of canola as an alternative to small grain crops has become an important part of crop rotation practices in Western Cape. It is particularly the herbicide-resistant cultivars that make it possible for canola to be included in crop rotation systems with wheat in many regions. In such crop rotation systems, canola usually causes an increase in the yields of the subsequent crops.

Consumption

Canola oil is the healthiest commodity oil available to consumers, the food service industry and food processors. Canola oil contains the least amount of saturated fat (7%) of any common edible oil, with the remaining 93% being healthy monounsaturated and polyunsaturated fats. The polyunsaturated fats in canola oil are essential omega-3 and omega-6 fatty acids. The omega-3, alpha-linolenic acid, may help prevent heart attacks and strokes. The omega-6, linoleic acid, is important for the brain and essential for the growth and development of infants.

Canola meal is used as an animal feed for dairy cows, pigs and poultry. Its unique characteristics are especially valuable in the dairy industry, where it has been shown that by including 20% canola meal in a feed ration improves milk production by one litre per cow per day.

Canola is primarily used for the manufacturing of canola oil and oilcake. On the local market, canola competes with other oilseeds such as sunflower seed and soya beans. The market for soft oils (oils that are liquid at room temperature), including canola oil, is a huge one and applications for this market are typically bottled oil for household use, e.g., soft margarine, mayonnaise, salad oil and various industrial uses.

The total supply of canola is projected at 327 830 tons for the 2024/25 marketing season. This includes an opening stock as from 1 October 2024 of 37 430 tons, domestic production of 290 400 tons and no imports. Total demand for canola for the 2024/25 marketing season was approximately 274 000 tons, while carry-out stocks on 30 September 2025 were approximately 53 830 tons.

For the 2025/26 marketing season, the total supply of canola is estimated at 365 470 tons (the estimated canola crop of 311 640 tons, together with carry-over stocks of 53 830 tons). Total demand for canola is estimated at 274 000 tons, while carry-out stocks at the end of September 2026 is expected to reach 91 470 tons.

Prices

As a large percentage of the local demand for vegetable oil is imported, the international oilseed prices largely determine the local prices of oilseeds and therefore the price of soya bean oilcake. The price of canola oil is based on the local price of sunflower oil and soya bean oilcake. Prices paid to producers vary, depending on the protein content and whether it is delivered for the feed market or to be crushed for oil.

The average producer prices of canola from 2020 to 2024 are as follows:

Season	**2020**	**2021**	**2022**	**2023**	**2024**
	R/ton				
Producer price	6 200,00	8 933,00	10 666,89	8 498,39	8 500,00

The average producer price of canola for 2024 is R8 500,00/ton, a slight increase of 0,02% compared to R8 498,39/ton in the previous year.

International overview

Global canola production has grown rapidly over the past 40+ years, rising from the sixth largest oil crop (soya beans, canola/rapeseed, sunflower seed, peanut, cotton seed, palm kernel and copra) to the second largest. During 2025/26, canola production is expected to contribute 13,1% to world oil crop production. During the same period, soya bean production, which is the largest oilseed crop, is expected to contribute 61,6% of the world oilseed crop production.

The Foreign Agricultural Service USDA Report indicated in September 2025 that world production of canola/rapeseed increased by 6,1%, from 85,7 million tons in the 2024/25 marketing season to 91,0 million tons in the 2025/26.

The key global canola producers during the 2025/26 marketing year is Canada contributing 22,0% (20,0 million tons), the European Union 21,6% (19,7 million tons), China 17,5% (15,9 million tons), India 13,2% (12,0 million tons) and other countries 25,7% (23,4 million tons) to world production.

The European Union, China and Japan are the primary importers (70,0%) of canola seed, while Canada accounts for 38,9% of canola seed exports.

Global canola consumption is expected to reach 89,7 million tons for 2025/26, compared to 87,9 million tons for 2024/25—an increase of 2,1%.

Global ending stocks for 2025/26 are expected to increase by 1,0 million tons, from 10,4 million tons in 2024/25 to 11,4 million tons in 2025/26.

Research and information

The Western Cape Department of Agriculture conducts research and cultivar trials on canola. The Protein Research Foundation (PRF) funds this research, and it is the task of the canola-working group of the PRF to promote the local canola industry.

The information function for canola is performed by the SAGIS; a Section 21 company funded by, among others, the oilseeds industry.

Cotton

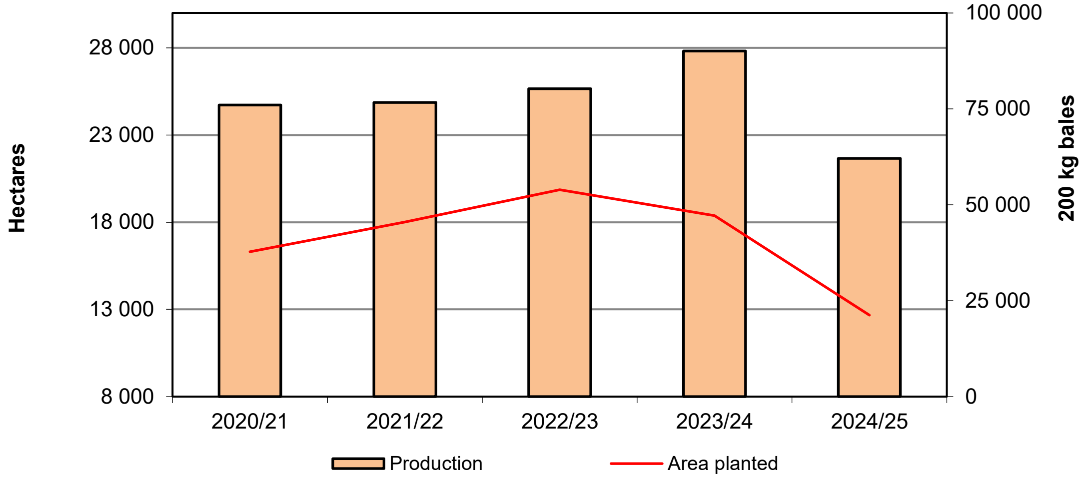
In South Africa, cotton is grown in the warm regions of Limpopo, Mpumalanga, Northern Cape, North West and KwaZulu-Natal where minimum night temperatures are at least 15 °C during the growing season. Cotton is planted mainly during October, although planting can be done until the second half of November.

The cotton industry is labour intensive and provides work for roughly one worker per hectare of cotton planted. Oil extracted from cottonseed can be used for cooking and salad dressings. Extracted seed can also be used as a fertiliser or as feed for livestock, poultry and fish.

Area planted and production

The total area planted to cotton in South Africa for the 2024/25 production season is estimated at 12 673 ha, which is a decrease of 31,1% from 18 385 ha of the previous season.

Area planted to cotton and production of cotton lint in the RSA
2019/20–2023/24



Source: Cotton SA

Yields per hectare under irrigation are 5,0% more than on dry land. An estimated average yield of 4 628 kg/ha seed cotton was realised on irrigated land during the 2024/25 production season, compared to 920 kg/ha realised on dryland.

During 2024/25, an estimated 55,6% of the total area planted to cotton was on dryland, as against 60,7% in the previous season. The area under irrigation also decreased by 20,5% from 2023/24 to 2024/25.

The domestic production of cotton lint for the 2024/25 marketing season (April to March) is estimated at 62 897 bales of 200 kg each, which is a decrease of 30,2% from the 90 118 bales produced during the 2023/24 season.

Areas planted to cotton and the production of cotton lint from the 2020/21 to 2024/25 production seasons by the RSA and Eswatini compare as follows:

RSA

Production season	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25**
Total RSA plantings (ha)	16 311	18 018	19 864	18 385	12 951
Dryland (ha)	5 802	10 823	13 556	11 159	7 206
Irrigation (ha)	10 511	7 195	6 308	7 226	5 745
Production of cotton lint (200 kg bales) from RSA-grown cotton	76 009	76 659	80 225	90 118	62 897

Eswatini

Production season	2020/21	2021/22	2022/23	2023/24	2024/25
Total Eswatini plantings (ha)	0	0	0	0	0
Dryland (ha)	0	0	0	0	0
Irrigation (ha)	0	0	0	0	0
Production of cotton lint (200 kg bales) from Eswatini-grown cotton	0	0	0	0	0

** Estimates (September 2025)*

Source: Cotton SA

World cotton production for 2024/25, as forecast by the International Cotton Advisory Committee (ICAC), is expected to be 25,43 million tons. Mill use is projected at 25,39 million tons for 2024/25; the global economic growth has weakened, and this slowdown is expected to continue in 2025/26.

The international reference price of cotton, as measured by the Cotlook A-index, has risen to 94 US cents per pound. The local average cotton price emulates the international price.

Cotton is an agricultural product and the uncertainties in production, consumption, weather condition and pest pressures all contribute to the price volatility surrounding these uncertainties.

The average producer price for seed cotton (lint and seed derived from the boll of the cotton plant before it is ginned) for the 2024/25 marketing season (April to March) was 1027 c/kg, while the price for 2025/26 is projected to remain constant at 1 027 c/kg. In South Africa, the price of cotton normally emulates global price trends.

The average South African producer prices for seed cotton and cotton lint compare as follows:

Marketing year	2021/22	2022/23	2023/24	2024/25	2025/26*
	c/kg				
Seed cotton	886	1 347	1 135	1 027	896
Cotton lint	2 537	3 610	3 258	3 007	2491

**Projections*

Consumption

Consumption of cotton lint by RSA and Eswatini spinners for the 2024/25 marketing year is estimated at 11 064 bales of 200 kg, compared to the 15 573 bales of the 2023/24 year—a decrease of 29,0%.

Consumption of cotton lint by South African and Eswatini spinners compared as follows:

Marketing year	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25***
	200 kg bales				
Consumption	19 480	15 707	19 091	15 573	11 064

**Projection*

Marketing arrangements, information and research

In terms of the free trade agreement between countries within the SADC region that has been in force since 2000, there has been no duty on cotton imports since 1 January 2004.

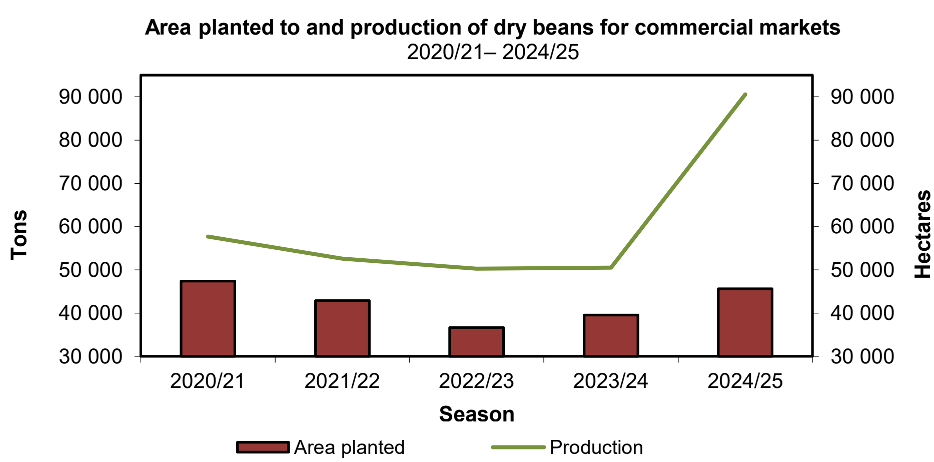
Locally, either the seed cotton is sold to a ginner who gins and sells lint to spinners and seed to processors, or a producer may contract a ginner to gin at a fee, in which case the lint will be sold either by the producer or by the contracted ginner on the producer's behalf.

After the Cotton Board was dissolved in 1998, stakeholders in the cotton industry formed a section 21 company named Cotton SA. A statutory levy, which was introduced in April 2004 in terms of the Marketing of Agricultural Products Act, 1996 (Act No. 47 of 1996), is applicable to finance research and the other functions of Cotton SA, namely information, promotion and grading. Research is coordinated by Cotton SA and performed by the ARC.

Dry beans

Areas planted and production

According to the Crop Estimates Committee, an estimated 45 620 ha were planted to dry beans for commercial markets during the 2024/25 production season, compared to 39 550 ha planted in 2023/24. This represents



an increase of 15,4% as compared to 2023/24 and is also 5,3% more than the average of 43 328 ha planted during the five years up to 2023/24. The estimated commercial crop of 90 556 tons for 2024/25 is 79,3% more than the previous crop of 50 495 tons. The 2024/25 crop is 64,2% more than the five-year average of 55 163 tons up to 2023/24. The average yield for the 2024/25 crop is approximately 1,99 t/ha—an increase of 55,5% from the 1,28 t/ha of the previous season.

Limpopo produced 33,7% (30 525 tons) of the 2024/25 commercial crop, followed by Free State with 31,9% (28 875 tons), North West with 18,9% (17 100 tons) and KwaZulu-Natal with 5,6% (5 100 tons). The remaining 9,9% (8 956 tons) was produced in the other provinces.

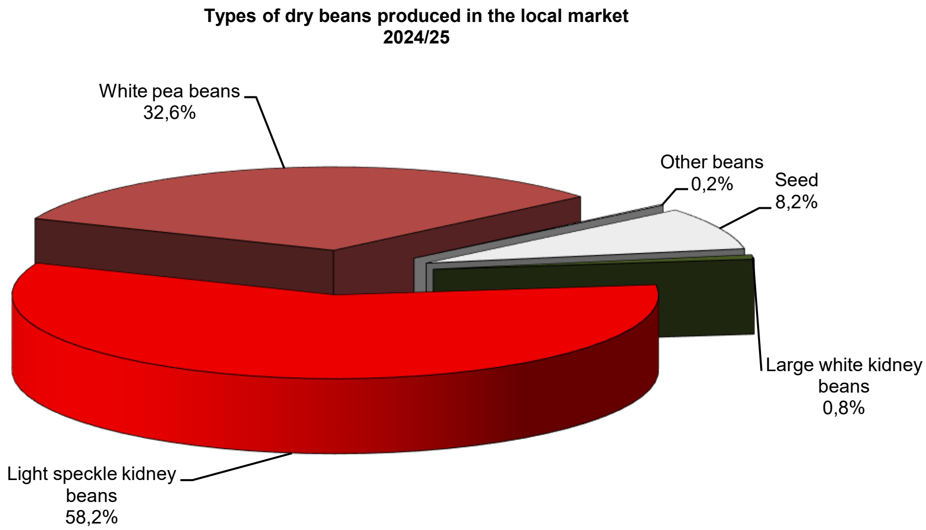
Production in the provinces and their share of the 2024/25 dry bean crop are as follows:

Province	**Production (t)**	**Share in crop (%)**
Western Cape	200	0,22
Northern Cape	2 280	2,52
Free State	28 875	31,89
Eastern Cape	400	0,44
KwaZulu-Natal	5 100	5,63
Mpumalanga	4 176	4,61
Limpopo	30 525	33,71
Gauteng	1 900	2,10
North West	17 100	18,88
Total	90 556	100,00

Dry beans contributed an estimated amount of R1 830 million to the gross value of field crops for the 2024/25 season, which is 29,3% more than the R1 415 million of the previous season, while the average annual gross value of dry beans for the five years up to 2023/24 amounts to approximately R1 098 million.

The contribution of different types of dry beans to total local production in 2024/25 is estimated to be as follows:

Light speckled kidney beans – 52 671 tons (58,2%), white pea beans – 29 544 tons (32,6%), seed – 7 426 tons (8,2%), large white kidney beans – 765 tons (0,8%) and other dry beans – 149 tons (0,2%), mainly cariocas.



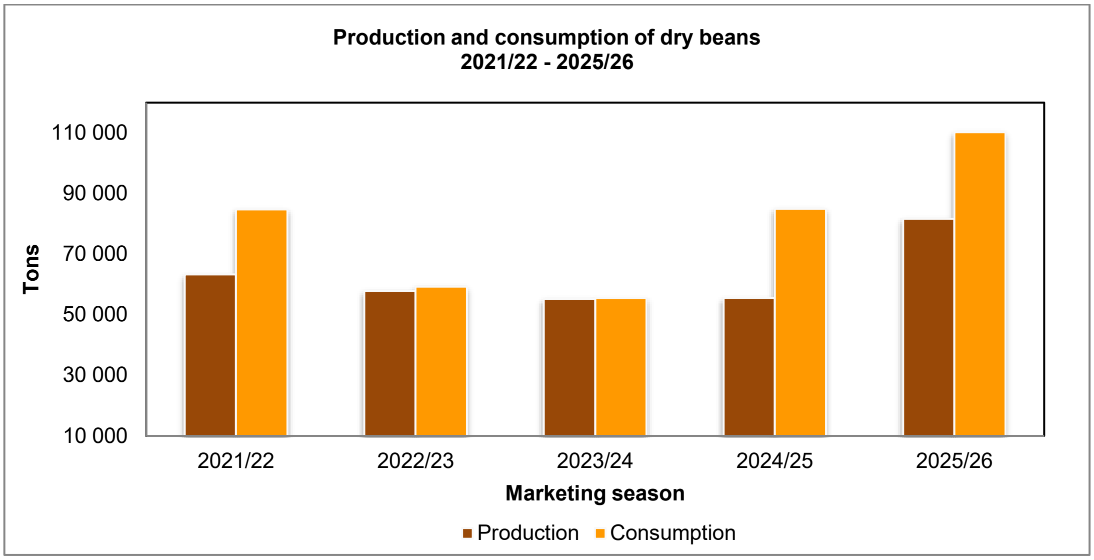
The most extensive seed production takes place in the Lowveld area of Mpumalanga, followed by Limpopo and Northern Cape.

In an attempt to improve profitability for producers and to meet the increase in protein demand, new cultivars with higher yields have been developed by the Dry Bean Producers' Organisation in cooperation with the ARC's Grain Crops Institute. These cultivars are suited for most soil types, have greater resistance to diseases and can be grown successfully in different areas.

Consumption

An estimated amount of 110 262 tons of dry beans is expected to be consumed locally during the 2025/26 marketing season (April to March), which is 29,7% more than the 84 991 tons in 2024/25. The projected per capita consumption for 2025/26 is 1,57 kg, which is 27,6% more than the 1,23 kg in 2024/25.

According to the Department of Agriculture, the quantities of dry beans produced and consumed from the 2021/222 to the 2025/26 marketing season were as follows:



Producer prices

The average prices received by producers for dry beans from the 2020/21 to 2024/25 production season are as follows:

Production season	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25**
	R/t				
Producer price	14 396	19 232	20 457	25 483	22 392

The average producer price of dry beans decreased by 12,1%, from R25 483/ton in the 2023/24 production season to R22 392/ton in the 2024/25 production season. The producer price of dry beans in South Africa is derived mainly from import parity from China and local supply and demand has a limited effect on price determination.

Trade balance

Imports of dry beans to and exports from South Africa during the five marketing seasons from 2021/22 up to 2025/26 are as follows:

Marketing season	**2021/22**	**2022/23**	**2023/24**	**2024/25**	**2025/26***
	Tons				
Imports	43 148	28 850	18 908	43 827	43 118
Exports	21 735	26 925	18 770	14 382	13 585

**Projection*

The expected imports of dry beans show a decrease of 1,6%, from 43 827 tons in 2024/25 to 43 118 tons in 2025/26. Imports of dry beans during the first five months of the 2025/26 marketing season were mainly from Brazil, Botswana, the United States and Ethiopia.

The projected exports of dry beans decreased by 5,5%, from 14 382 tons in 2024/25 to 13 585 tons in the 2025/26 marketing season. During the first five months of the 2025/26 marketing season, exports of dry beans were mainly to Eswatini (Swaziland), Lesotho, Taiwan and Thailand.

Research and information

The Dry Bean Producers' Organisation is the national commodity organisation promoting the interests of the dry bean producers in the country. The main objectives of the organisation are to provide production and market information, support product and market research and ensure the supply of disease-free certified seed to producers.

Sugar cane

Sugar cane is a ratoon crop, which means that after cropping, new shoots emerge from the roots. It yields up to 10 crops from the original rootstock, after which it is uprooted, and the field is replanted. This is done on a rotational basis, with approximately 10% of the area under sugar cane being replanted each season. Planting usually coincides with the first spring rains.

In the cooler production areas, sugar cane is harvested 18 to 24 months after re-sprouting. Late harvesting maximises growth and the sucrose content of the cane. In the coastal areas, where the crop grows faster, it is harvested at an average age of approximately 12 months, usually from April to December.

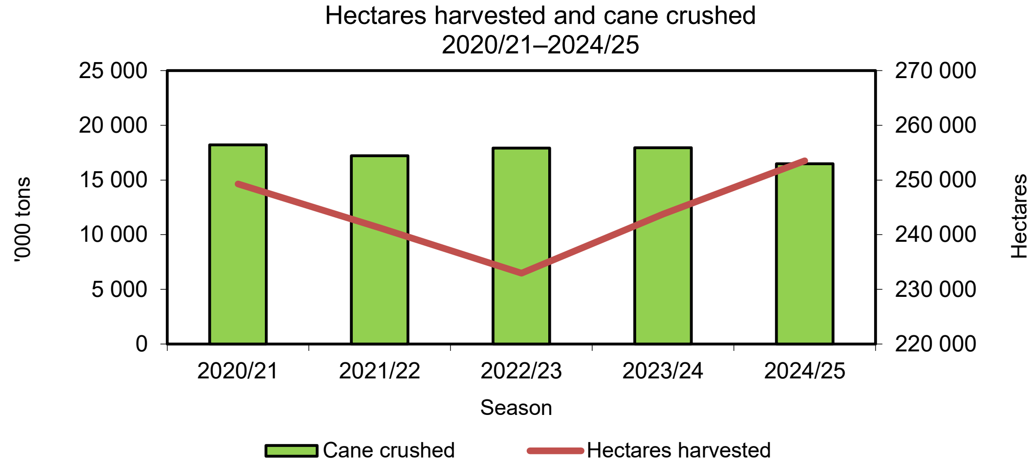
Industry overview

The South African Cane Growers' Association, established in 1927, administers the sugar cane-growing industry in South Africa. The industry is regulated in terms of the Sugar Act, 1978 (Act No. 9 of 1978) and the Sugar Industry Agreement (SIA 2000), which are binding on all sugar cane growers and producers of sugar products.

The cane-growing sector comprises approximately 24 000 cane growers of whom more than 23 000 are small scale cane growers and has grown to support more than one million livelihoods, farming predominantly in KwaZulu-Natal (KZN) and Mpumalanga.

Production and price of sugar cane

The production of sugar cane decreased by 8,2% to 16,47 million tons produced in 2024/25 from 17,94 million tons that was produced in 2023/24 production season.



The average cane production over the past decade (from the 2016/17 to the 2024/25 season) is 17,6 million tons per annum, with the yield of harvested cane averaging 71,1 t/ha over the same period. The yield stands at 73,6 t/ha for the 2023/24 season. The area harvested increased by 4,0%, from 243 789 ha in 2023/24 to 253 510 ha in 2024/25.

The producer price of sugar cane increased by 4,7%, from R895,29/t in 2023/24 to R937,12/t in 2024/25.

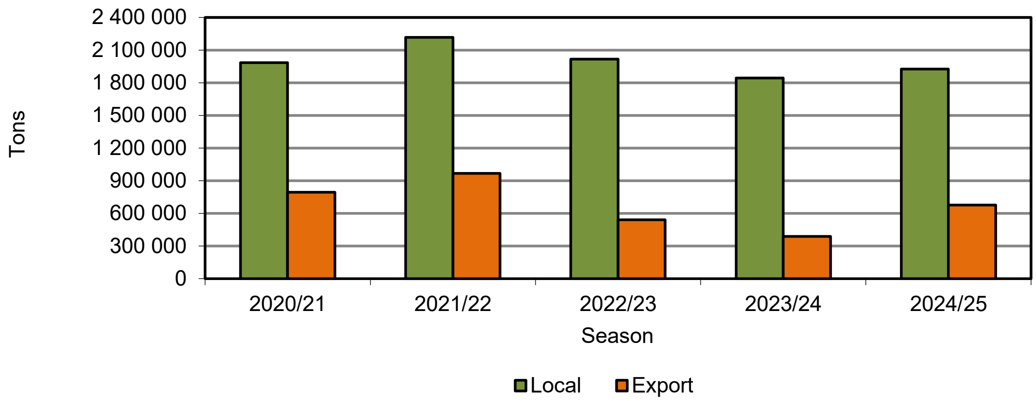
The average producer prices of sugar cane from 2020/21 to 2024/25 were as follows:

Year	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25**
	R/ton				
Producer price	613,28	644,63	647,16	895,29	937.12

Production and consumption of sugar

The local production of sugar reached a record level of 2,76 million tons during the 2002/03 season. For 2024/25, production is estimated at 1,87 million tons. The quantity of cane crushed to produce one ton of sugar stands at 8,79 tons for the 2024/25 season.

Production of sugar for local and export markets
2020/21–2024/25



Marketing

The Sugar Act, 1978 (Act No. 9 of 1978) and the Sugar Industry Agreement (SIA 2000), endorse a regulatory provision within which the pricing of refined sugar in South Africa takes place. The combination of the regulatory provisions allows the sugar industry to maintain a domestic sugar price that is at or near the import parity price, including the tariff that eradicates price discrimination and anti-competitive practises within the industry. With sugar prices pushed up close to import parity price, the country's sugar industry can maximise profit that will impact positively on the economy.

South Africa continues to be one of the world's most cost competitive producers of high-quality sugar and the key drivers of excellence is its export infrastructure, world-renowned agriculture, industry research platforms and efficient industry organisation.

The raw sugar exports are handled at the Sugar Terminal in Durban. The terminal provides storage and handling facilities for the sugar industry's export production of bulk raw and bagged (raw and refined) sugar. It also houses a unique molasses mixing plant, which coats bulk raw sugar at the time of loading to produce variable levels of quality, as specified by the international buyers.

A total of 431 464 tons of sugar were produced for the international market during the 2024/25 season. About 60% of this sugar is marketed in the Southern African Customs Union (SACU) and the remainder is exported to markets in Africa, Asia and the Middle East. The total supply of 1,44 million tons of sugar to the Southern African Customs Union (SACU) during 2024/25 is a decrease of 4,5% from the 1,51 million tons supplied in 2023/24.

The local production and sales of sugar to the SACU from 2020/21 to 2024/25 were as follows:

Year	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25**
	'000 tons				
Production	2 018	1 842	1 926	2 005	1 875
Sales to SACU	1 476	1 453	1 250	1 510	1 443

Research, training and other information

To improve the quality of the cane produced and the profitability of cane production, the South African Sugarcane Research Institute is tasked with developing new sugar cane varieties and the improvement of crop management and farming systems, which are then made available to cane farmers. This information includes improving soil quality, minimising the occurrence of pests and diseases and research on the optimal choice in the use of fertilisers, water and ripening and weed-control agents.

Currently, modern biotechnological approaches are deployed to develop systems for rapid bulking and distribution of high-quality cane seed and investigate the biological basis of sucrose accumulation in sugar cane, with a view to enhance the process. The quality of cane deliveries to the mills is determined by the Cane Testing Services, while Umthombo Agricultural Finance assists small-scale cane farmers with regard to credit and savings facilities.

HORTICULTURE

Deciduous fruit

Production areas

The main deciduous fruit producing areas of South Africa are situated in Western Cape and Eastern Cape, mostly in areas where warm, dry summers and cold winters prevail. According to the HORTGRO Tree Census of 2024, the area under deciduous fruit production during the 2024/25 season is estimated at 53 748 ha, a decrease of 523 ha (1,0%) compared to 54 271 ha the previous year.

The areas planted in hectares (ha) per fruit type over the past five seasons compare as follows:

Fruit type	2020/21	2021/22	2022/23	2023/24	2024/25
	Hectares				
Apples	25 272	25 209	25 438	25 114	25 080
Pears	12 913	12 848	12 950	12 892	12 850

Table grapes	20 564	20 379	19 788	19 488	19 404
Peaches and nectarines	8 049	7 809	8 057	7 682	7 487
Apricots	2 371	2 240	2 241	2 223	2 177
Plums	5 451	5 523	5 465	5 430	5 139

Production

In South Africa, there are about 1 128 producers of stone fruit and of pome fruit.

Fruit type	2020/21	2021/22	2022/23	2023/24	2024/25
	Tons				
Apples	1 144 771	1 296 158	1 375 570	1 334 427	1 229 426
Pears	456 238	550 785	506 939	465 614	558 526
Table grapes	362 208	376 228	321 678	368 622	386 021
Peaches and nectarines	169 101	178 931	166 724	141 389	150 416
Apricots	33 195	24 134	30 895	26 674	23 398
Plums	101 969	111 809	93 063	85 394	98 689
Total	2 267 482	2 538 045	2 494 869	2 422 120	2 446 476

The production (tons) per fruit type, which excludes dried fruit, over the past five seasons compares as follows:

The production of deciduous fruit increased by (1,0%), from 2,422 million tons in 2023/24 to 2,446 million tons in 2024/25. The production of most fruits showed an increase, except apricot which showed a decrease of (12,3%) from 26 674 tons in 2023/24 to 23 398 tons in 2024/25, followed by apples with a decrease of (7,9%) from 1,334 million tons in 2023/24 to 1,229 million tons in 2024/25.

Pears showed a huge increase of 92 912 tons (20,9%), followed by grapes with 17 399 tons (4,7%), plums with 13 295 tons (15 ,6%) and peaches and nectarines with 9 027 tons (6,4%), respectively.

Marketing

During 2024/25, deciduous fruit contributed approximately 26,2% to the gross value of horticultural products.

Approximately 405 163 tons of deciduous fruit were sold locally on the major fresh produce markets, other markets and directly to retailers during the 2024/25 season, representing a decrease of 1,2% from 409 970 tons sold during the 2023/24 season.

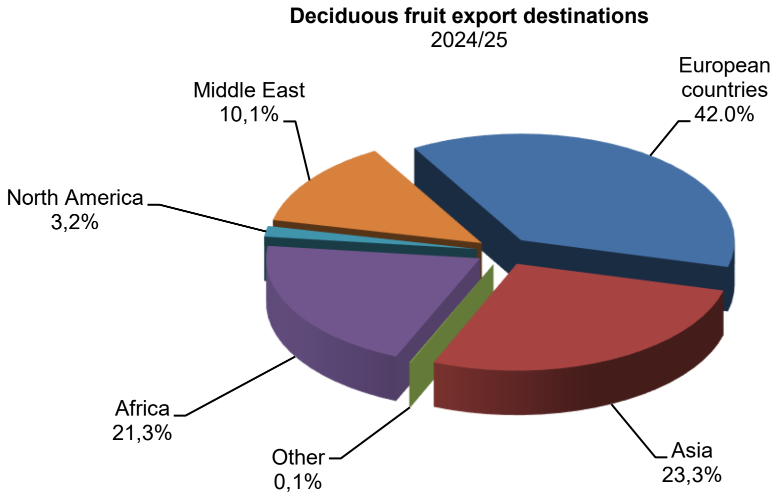
The average prices (R/ton) realised for deciduous fruit on the major fresh produce markets during the period 2019/20 to 2023/24 were as follows:

Fruit type	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25**
	R/ton				
Apples	7 590	7 421	8 562	9 971	11 520
Pears	7 192	7 087	8 210	9 768	9 110
Table grapes	17 447	18 766	20 440	24 295	28 581
Peaches and nectarines	15 294	14 733	15 582	18 416	19 941
Apricots	15 326	17 114	18 134	19 168	16 830
Plums	8 669	8 202	9 494	11 249	11 451

The price of grapes showed the biggest increase of R4 286/ton (17,6%), followed by apples with R1 549/ton (15,5%), peaches and nectarines with R1 555/ton (8,3%) and plums with R 202/ton (1,8%), while apricot showed a decrease of R2 338/ton (14,5 %) followed by pears with R 685/ton (6,7%).

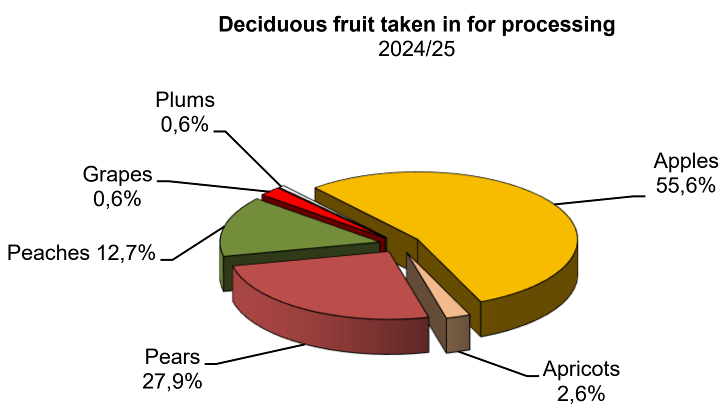
The exporting of deciduous fruit is a major earner of foreign exchange for South Africa. During the 2024/25 season (October to September), about 54,4% of deciduous fruit produced was exported and approximately 81,4% of the gross value from deciduous fruit came from export earnings. Total exports amounted to 1 330 584 tons. This represents an increase of 3,7% from the 1 282 583 tons exported during 2023/24.

The following graph indicates deciduous fruit export destinations during 2024/25.



Intake of deciduous fruit for processing

During 2024/25, about 710 729 tons of deciduous fruit produced were utilised for processing—a decrease of 2,6% from the 729 567 tons processed during 2023/24.



The following graph indicates the contribution of deciduous fruit types to total deciduous fruit taken in for processing during 2024/25.

Over the past five seasons, 84,7% of deciduous fruit was processed into juice, while 14,8% of canning were mostly used for peaches and apricots

During 2024/25, approximately 98,9% of apples taken in for processing was used for juice and 1,1% was used for canning, while 84,3% of pears was used for juice and 15,7% was canned. Producers received an average of R2 300/t and R2 278/t for apples used for canning and for juice, respectively. Regarding pears, producers received the average price of R3 066/t and R1 866/t for canning and juice, respectively.

Domestic consumption

Local per capita consumption and total consumption of deciduous fruit over the past five years were as follows:

Season	2020/21	2021/22	2022/23	2023/24	2024/25
Per capita consumption (kg/year)	12.33	14.45	15.54	12.18	10.44
Total consumption (‘000 tons)	741	896	974	768	659

Prospects

The 2025 apple export season ended at a high of 49.6 million equivalent cartons (12.5 kg). The initial estimate for the 2026 export season indicates a 5% increase in volumes, bringing expected apple exports to 52.2 million equivalent cartons. The growth in export volumes is attributed to increased production as young orchards reach full production, improved orchard performance and the recovery from challenges experienced in the previous season

Pear export volumes, however, are expected to decrease slightly compared to the previous season. The current estimate for the 2026 pear export season is 22.3 million equivalent cartons, a 4% decline from 2025. The reduction is mainly attributed to orchard removals, smaller fruit size and the exceptionally strong export volumes achieved in certain pear varieties during the previous season. There are indications that the production for stone fruit will increase.

Subtropical fruit

Measured in terms of value of production, the subtropical fruit industry earned R8 473 million in 2024/25—a decrease of 6,4% from the 2023/24 figure of R9 048 million.

Production and production areas

The cultivation of some types of subtropical fruit is only possible in certain specific areas of the country because of climatic requirements. In general, subtropical fruit types need warmer conditions and are sensitive to large temperature fluctuations and frost. The best areas to produce these types of fruit in South Africa are in Limpopo, Mpumalanga and KwaZulu-Natal. Fruit types such as granadillas and guavas are also grown in Western Cape, while pineapples are cultivated in Eastern Cape and KwaZulu-Natal.

The total production area of avocados in 2024/25 is estimated at approximately 21 240 ha, mangoes at 5 775 ha and litchis at 1 389 ha.

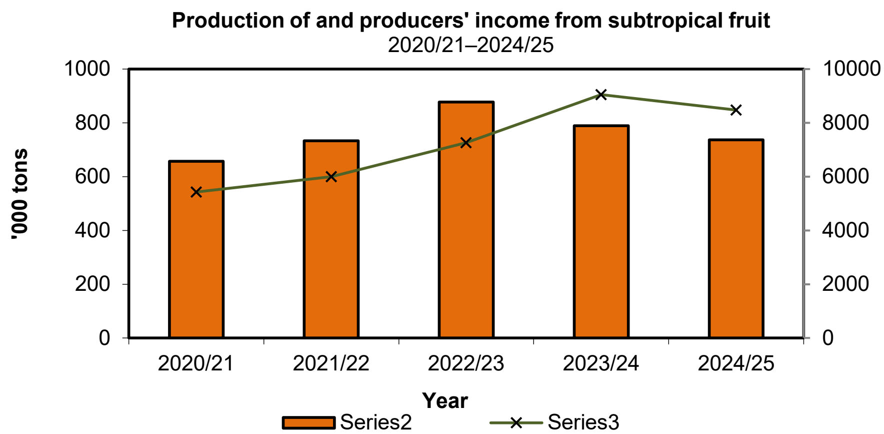
The production of subtropical fruit from 2020/21 to 2024/25 is as follows:

Fruit type	2020/21	2021/22	2022/23	2023/24	2024/25
	’000 tons				
Avocados	87,8	87,3	117,1	125,0	118,0
Bananas	336,8	397,7	535,5	412,7	394,1
Pineapples	114,8	127,7	133,5	127,1	112,2

Mangoes	74,5	62,4	84,3	82,7	68,0
Papayas	9,4	8,7	9,9	5,7	7,4
Granadillas	0,7	1,3	0,6	0,4	0,6
Litchis	6,4	5,6	6,8	5,6	5,3
Guavas	27,0	26,1	25,6	29,7	21,3

The total production of subtropical fruit decreased by 6,4%, from 788 861 tons in 2023/24 to 736 889 tons in 2024/25. Production of guavas decreased by 28,3%, mangoes by 17,8%, pineapples by 11,7%, avocados by 5,6%, litchis by 5,4%, and bananas by 4,5%.

However, the production of granadillas raised by 50,0%, and papayas by 29,8%.



Bananas, avocados and pineapples contributed 53,5%, 16,0% and 15,2%, respectively, to the total production of subtropical fruit during the 2024/25 season.

Domestic sales

During 2024/25, the largest contributors to the sales of subtropical fruit on the major fresh produce markets were bananas (76,6%), avocados (9,5%), pineapples (6,9%), and mangoes (5,7%), followed by papayas (0,5%) and guavas, litchis and granadillas combined (0,8%).

The quantities of all the fruits avocados, bananas, pineapples, mangoes, papayas, granadillas, litchis and guavas sold on the major fresh produce markets decreased during 2024/25.

Total quantities of subtropical fruit sold on the major fresh produce markets (year ending 30 June) are as follows:

Fruit type	2020/21	2021/22	2022/23	2023/24	2024/25
	Tons				
Avocados	24 145	23 078	33 771	29 882	28 666
Bananas	195 963	233 370	316 328	242 765	231 444
Pineapples	20 918	23 993	23 657	21 297	20 981
Mangoes	19 259	19 220	15 176	18 488	17 190
Papayas	5 318	4 737	4 921	3 149	1 490
Granadillas	385	398	296	220	279
Litchis	1 653	986	1 920	942	593
Guavas	1 853	1 771	1 796	1 555	1 431
Total	269 494	307 553	397 865	318 303	302 074

Intake for processing

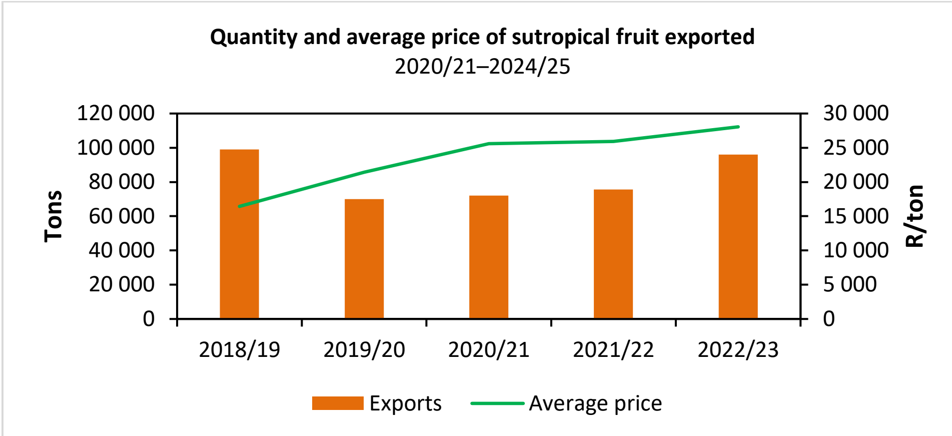
During 2024/25 (July to June), pineapples accounted for 60,2% of the total intake of subtropical fruit types for processing. The other two main contributors to the processing industry were mangoes (25,5%) and guavas (12,1%).

The quantities of bananas, granadillas, papayas, avocados and litchis taken in for processing increased during 2024/25, while the intake of guavas, mangoes, and pineapples decreased.

Fruit type	2020/21	2021/22	2022/23	2023/24	2024/25
	Tons				
Avocados	8 207	7 278	7 547	6 563	7 265
Bananas	342	799	332	182	3 94
Pineapples	90 754	100 765	106 517	101 690	97 143
Mangoes	47 030	34 639	58 243	50 362	41 159
Papayas	1 309	1 569	2 479	623	1 183
Granadillas	194	783	276	111	226
Litchis	1 688	1 724	1 747	1 806	1 998
Guavas	24 816	24 024	23 431	27 848	19 596
Total	174 340	171 501	200 572	189 185	161 305

Exports

From 2023/24 to 2024/25, total exports of subtropical fruit decreased by 8,8%, from 113 664 tons to 103 636 tons and the average export price decreased by 9,5%, from R37 226/t to R33 691/t.



The main subtropical fruit type being exported is avocados. During 2024/25, exports of avocados contributed 67,6% to the total value of exports of subtropical fruit. Other types that were exported is litchis, mangoes, papayas, bananas and pineapples

Marketing and research

Research is largely funded through the relevant growers' associations. Organisations that carry out industry-funded research include the ARC-Institute for Tropical and Subtropical Crops (ITSC), universities and private research organisations.

Prospects

Expectations are that the production of most subtropical fruit types will increase during the 2025/26 production season.

Citrus fruit

Production areas

Citrus fruit is grown in Limpopo, Eastern Cape, Mpumalanga, Western Cape and KwaZulu-Natal in areas where subtropical conditions (warm to hot summers and mild winters) prevail.

The area under citrus production is estimated at 101 624 ha, according to CGA Industry Statistics 2025.

Production

Oranges contributed about 46,1% to the total production of citrus fruit in South Africa during 2024/25. Citrus fruit production increased by 21,6%, from 3 579 898 tons in 2023/24 to 4 353 111 tons in 2024/25. There has been an annual average increase of 8,8% (CAGR Formular) over the past five years in citrus production.

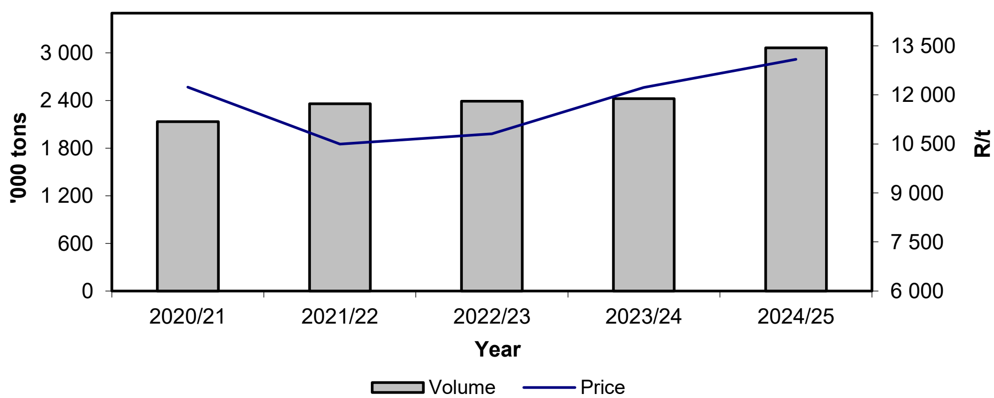
Citrus fruit production for the past five production seasons (1 February to 31 January) is as follows:

Fruit type	2019/20	2020/21	2021/22	2022/23	2023/24
	Tons				
Oranges	1 687 332	1 499 411	1 614 847	1 785 015	1 592 724
Grapefruit	379 173	349 454	423 695	423 695	422 376
Lemons	506 570	645 055	656 004	779 806	796 642
Naartjes	89 863	85 196	112 974	116 263	112 772
Soft citrus	326 942	415 569	520 613	567 567	655 384
Total	2 989 880	2 994 685	3 328 133	3 672 346	3 579 898

Exports

The citrus industry in South Africa is primarily export-orientated, with very small quantities being imported. South Africa is one of the major citrus fruit exporters in the world. Exports increased from 2 423 099 tons during 2023/24 to 3 064 835 tons during 2024/25, reflecting an increase of 26,5%. During 2024/25, the top five markets importing citrus fruits from South Africa include the Netherlands, the United Arab Emirates, the Russian Federation, the United Kingdom and the United States of America. South Africa's citrus exports

Citrus exports and average export prices
2020/21–2024/25



account for 10,9% of world exports, securing the second position in worldwide rankings for this product (ITC, 2025). About 1 383 380 tons of oranges (approximately 45,1% of the citrus crop) were exported.
Domestic sales

Citrus fruit sales on the major fresh produce markets in South Africa decreased by 19,8%, from 159 302 tons during 2023/24 to 127 738 tons during 2024/25 and accounted for about 2,9% of the overall citrus fruit production in 2024/25. During 2024/25, approximately 44,4% of the oranges production, 19,9% of nartjie, 18,9% of lemons, 14,3% of soft citrus and 2,5% of grapefruit were sold on the fresh produce markets.

The average prices realised on the major fresh produce markets during the period 2020/21 to 2024/25 were as follows:

Fruit type	2020/21	2021/22	2022/23	2023/24	2024/25
	R/ton				
Oranges	4 908	3 994	3 345	4 515	6 624
Grapefruit	6 420	6 133	4 654	6 951	7 500
Lemons	6 886	5 364	4 941	5940	6 961
Naartjes	6 654	6 437	6 201	7 857	9 499
Soft citrus	7 193	6 710	5 651	6 928	8 892

Processing

Approximately 23,7% of the total citrus fruit production was taken in for processing during 2024/25. Citrus fruit taken in for processing increased by 23,0%, from 839 340 tons in 2023/24 to 1 032 284 tons in 2024/25.

Consumption

Per capita consumption of citrus fruit from 2021 to 2025 were as follows:

Year	2021	2022	2023	2024	2025
	kg/year				
Per capita consumption	10,90	13,45	14,93	28.72	15,40

Research

The Citrus Research International (CRI) is mandated by the Citrus Growers' Association of Southern Africa (CGA) to maximise the long-term global competitiveness of the Southern African citrus growers through the development, support, coordination and provision of research and technical services. The CRI is a division of the CGA and research funding is primarily derived from levies on citrus exports.

Vegetables (excluding potatoes)

General

Vegetables are produced in most parts of the country. However, in certain areas farmers tend to concentrate on specific crops; for example, green beans are grown mainly in Kaapmuiden, Marble Hall and Tzaneen; green peas mainly in George and Vaalharts; onions mainly in Caledon, Pretoria and Brits and asparagus mainly in Ficksburg.

Production

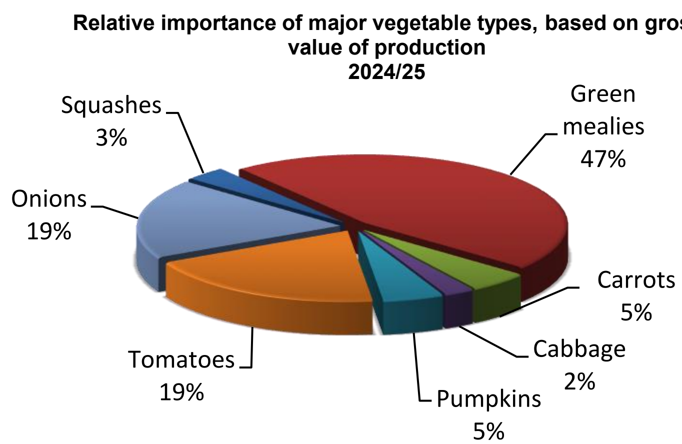
From 2023/24 to 2024/25 (July to June), the total production of vegetables (excluding potatoes) decreased by 0,5%, from 2 981 830 tons to 2 966 780 tons. All the major vegetable types in terms of volumes produced increased, except for tomatoes and carrots that decreased by 8,8% and 2,3%, respectively.

The production of vegetables (excluding potatoes) in South Africa for the period 2020/21 to 2024/25 compares as follows:

Year	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25**
	'000 tons				
Tomatoes	543	534	492	533	486
Onions	713	737	642	697	720
Green mealies and sweet corn	418	419	427	425	427
Cabbages	170	191	189	212	212
Pumpkins	271	274	285	278	299
Carrots	223	239	213	221	216
Other	665	653	625	616	607
Total	3 002	3 047	2 873	2 982	2 967

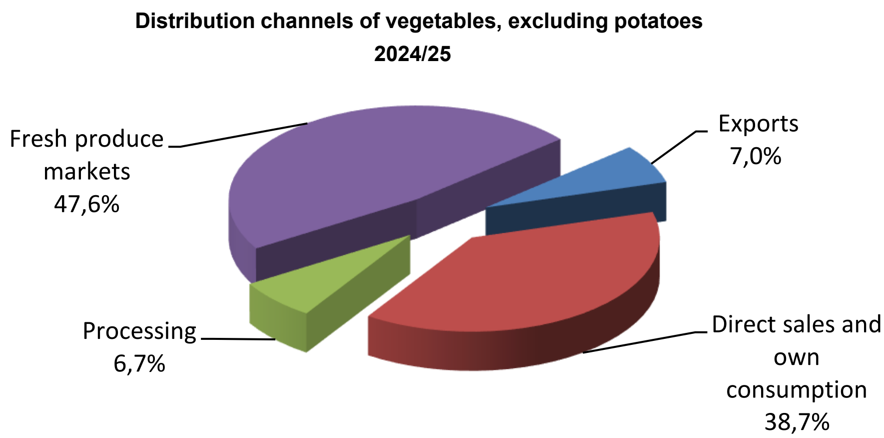
Relative importance of major vegetable types

The relative importance of the major vegetable types, according to gross value of production during the 12 months up to 30 June 2025, is depicted in the following graph:



Distribution channels

As depicted in the following graph, approximately 48% of the volume of vegetables produced is traded on the major fresh produce markets. The total volume of vegetables (excluding potatoes) sold on these markets during 2024/25 amounted to 1 412 416 tons, as against 1 275 828 tons sold during 2023/24, which represents an increase of 10,7%.



The values of sales of vegetables (excluding potatoes) on the major South African fresh produce markets for the period 2020/21 to 2024/25 were as follows:

Year	2020/21	2021/22	2022/23	2023/24	2024/25
	R'000				
Tomatoes	2 169 955	2 067 306	2 312 529	2 397 469	2 564 842
Onions	1 558 715	1 556 710	3 051 576	2 432 102	2 320 205
Green mealies and sweet corn	81 716	84 225	93 996	96 868	110 773
Cabbages	344 452	325 567	434 456	433 175	520 814
Pumpkins	149 622	158 505	175 415	185 871	167 286
Carrots	555 241	485 307	653 971	674 325	761 051
Other	3 052 497	2 878 957	3 193 046	3 817045	3 747 279
Total	7 712 198	7 556 577	9 856 315	9 603 680	10 192 250

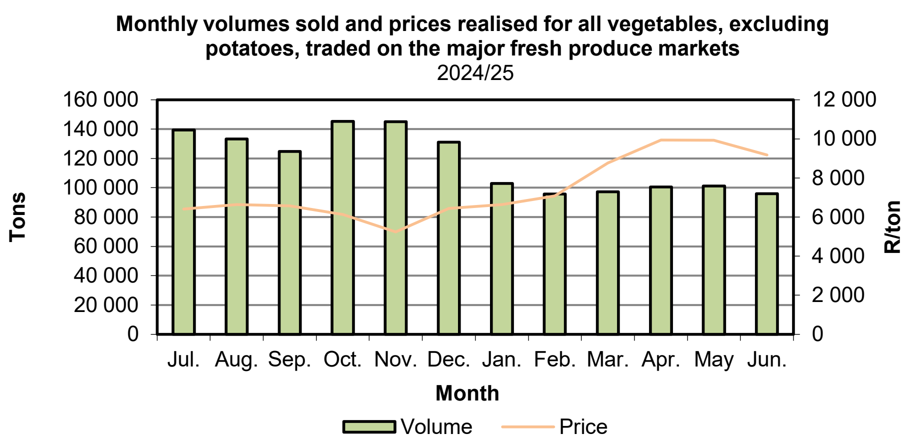
The value of the above vegetables, except for onions, pumpkins and other, increased during 2024/25 and the highest increase was for pumpkins with 20,2%.

Prices

The average prices of vegetables realised on the fresh produce markets for the period 2020/21 to 2024/25 were as follows:

Year	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25**
	R/ton				
Tomatoes	8 619,14	8 276,66	9 883,16	10 094,13	11 751,35
Onions	4 082,92	3 951,71	8 878,32	6 552,20	6 032,89
Green mealies and sweet corn	19 062,68	22 380,91	25 655,19	25 468,29	27 554,55
Cabbages	2722,74	2 285,66	3 089,75	2 728,52	3 285,57
Pumpkins	2 996,09	3 231,53	3 183,05	4 161,71	2 829,46
Carrots	4 243,73	3 468,65	5 227,43	5 323.79	6 262,78
Other	5 870,34	5 633,60	7 921,76	7 527,41	7 216,36

Of the major vegetable types, the price of onions decreased by 7,9%, whilst the price of pumpkins decreased by 32,0%.



Consumption

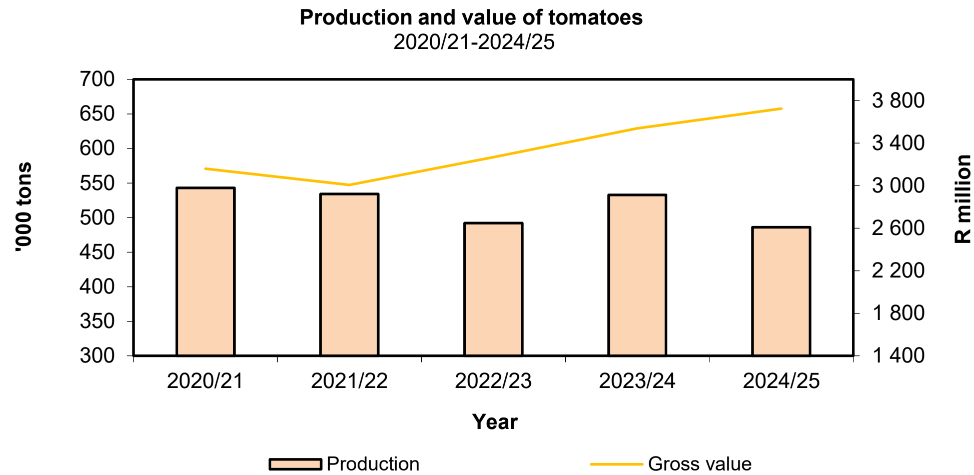
The importance of vegetables in a healthy diet is strongly promoted by all the stakeholders in the fresh produce marketing chain. The per capita consumption of fresh vegetables was 39,97 kg during 2024/25, decreased by 0,1% from 40,45 kg of 2023/24.

Tomatoes

Production and value

Production of tomatoes decreased by 8,7%, from 532 768 tons in 2023/24 (July to June) to 486 412 tons in 2024/25.

The gross value of production increased by 5,0%, from R3 539 million in 2023/24 to R3 724 million in 2024/25.



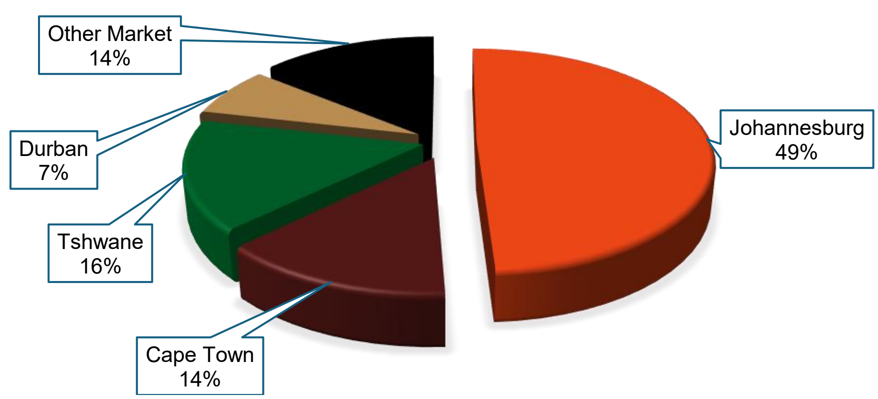
Sales

Sales on fresh produce markets constituted approximately 44,6% and direct sales approximately 44,9% of the total volume of tomato sales.

Due to the geographic distribution and production of tomatoes, a sufficient volume of good-quality tomatoes is typically produced throughout the year to meet daily demand.

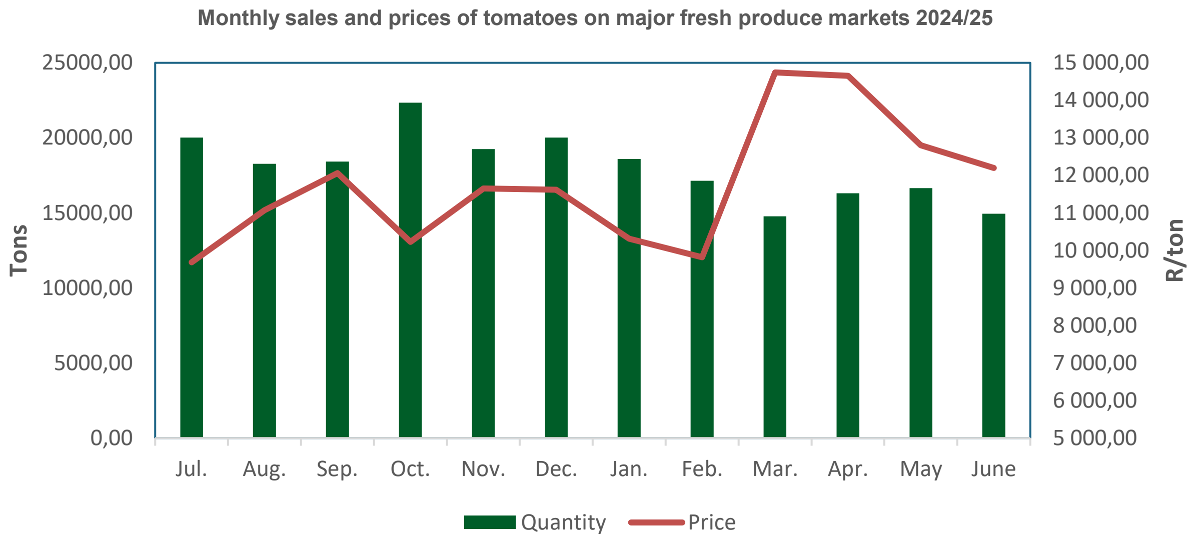
The quantity of tomatoes sold at the 17 major fresh produce markets decreased by 8,1%, from 235 918 tons in 2023/24 to 216 746 tons in 2024/25.

TOMATO SALES ON THE MAJOR FRESH PRODUCE MARKET 2024/25



Prices

The average price of tomatoes sold on the major fresh produce markets increased by 12,9%, from R10 395,21/t during 2023/24 to R11 737,55/t during 2024/25.



*Exports**

The quantity of tomatoes exported increased by 3,9%, from 19 321 tons in 2023/24 to 20 079 tons in 2024/25.

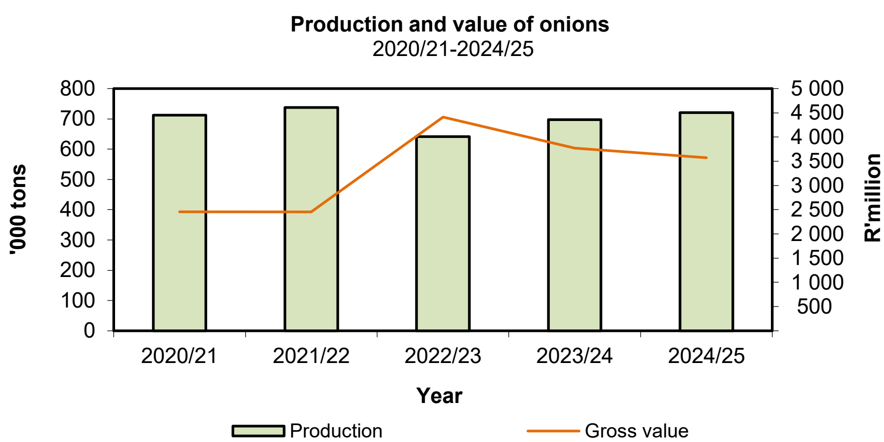
*Source: *Customs and Excise*

Onions

Production

Onions are produced in almost all of South Africa's provinces.

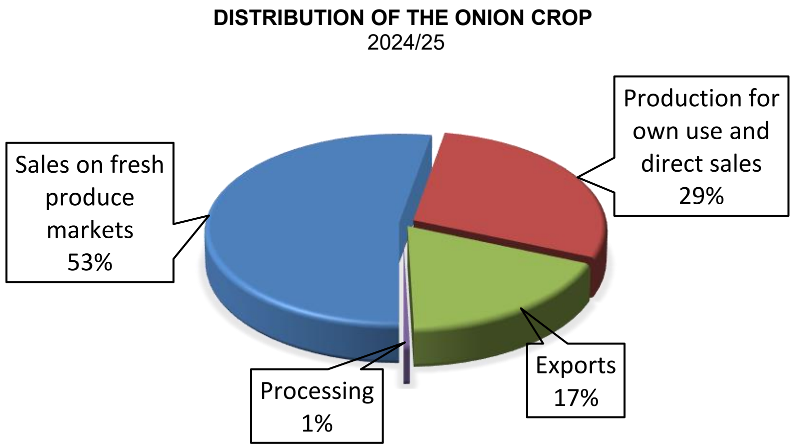
Approximately 720 317 tons of onions were produced during the 2024/25 season (July to June). This is 3,4% more than the 696 950 tons of the previous season. The industry experienced an average annual decrease of 1,1% in production from 2020/2021 to 2024/2025.



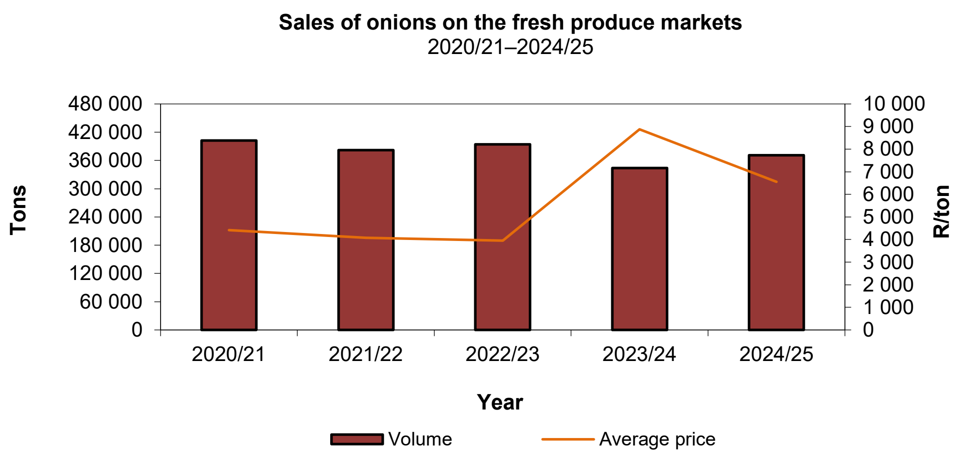
Sales

The fresh produce markets remain an important marketing channel for onions. Approximately 53% of the total production during the 2024/25 season was sold on the major fresh produce markets, while 17% was exported.

The remainder comprises of producers' own consumption and direct sales to supermarkets and chain stores (29%) and a small quantity, 1%, was sold to processing factories.



The sales of onions on the fresh produce markets increased by 3,6%, from 371 188 tons in 2023/24 to 384 593 tons in 2024/25.



Prices

The average price of onions sold on the fresh produce markets has significantly decreased by 7,9%, from R6 552/t in 2023/24 to R6 033/t in 2024/25.

Processing

Approximately, 1% of the total production of onions was taken in for processing during the 2024/25 season. There has been a decrease of 4,7% in the total processing of onions since the 2020/21 season, when 4 039 tons were taken in for processing compared to 4 329 tons in the 2024/25 season. During 2024/25, about 90,7% was canned and the remaining 9,3% was frozen.

*Exports**

During the 2024/25 season, the volume of onions exported represented approximately 17,2% of the total onion crop. The volume of exports increased by 1,6%, from 121 775 tons in 2023/24 to 123 715 tons during 2024/25.
* Source: *Customs and Excise*

Potatoes

There are 16 distinct potato-production regions in South Africa, which are spread throughout the country. The main regions are situated in Free State, Western Cape, Limpopo and Mpumalanga. Potatoes are planted at different times because of climate differences in the production areas, resulting in fresh potatoes being available throughout the year. In the early 1990s, there was a major shift in production from dryland to irrigation and currently almost 80% of plantings are under irrigation.

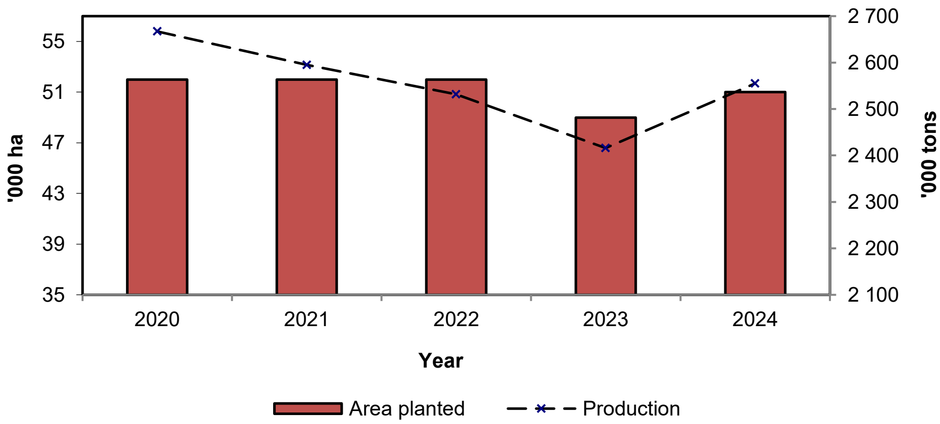
Area planted

Plantings for 2024 were 51 368 ha, which was 3,1% more than the 49 841 ha of the previous year.

Production

In 2024, the average yield was approximately 4 975 x 10 kg pockets per hectare, compared to 4 848 x 10 kg pockets per hectare in 2023, which is an increase of 2,6%.

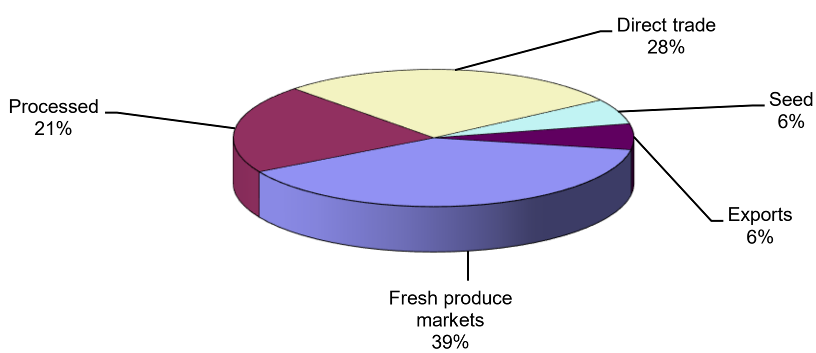
Production of and area planted to potatoes
2020–2024



Sales

The major fresh produce markets remain an important channel for the sale of potatoes.

Utilisation of the potato crop
2024



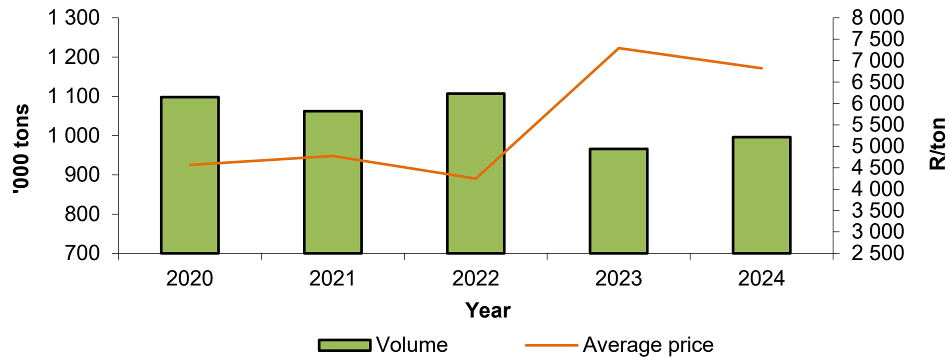
During 2024, approximately 99,6 million x 10 kg pockets of potatoes were sold on the major fresh produce markets, as against 96,6 million in 2023—an increase of 3,1%. The Johannesburg Fresh Produce Market remains the biggest outlet, followed by Tshwane, Cape Town and Durban markets. During the five years from 2020 to 2024, potato sales on the major fresh produce markets on average showed a decrease of approximately 3,4%.

Prices

Between 2020 and 2024, potato prices realised on the major fresh produce markets increased by an average of 12,2% per annum, from R4 562 per ton in 2020 to R6 824 per ton in 2024.

The average price decreased by 6,4%, from R7 291 per ton in 2023 to R6 824 per ton in 2024.

Potato sales and prices on the major fresh produce markets
2020–2024



Processing

During 2024, approximately 21,0% of the total potato production was taken in for processing. About 91,0% of these potatoes were processed into potato chips, both fresh and frozen. The remaining 8,0% and 1,0% was used for freezing and canning, respectively. The processing of potatoes showed an increase of 18,1%, from 454 431 tons in 2023 to 536 565 tons in 2024.

*Exports**

In 2024, 155 360 tons, approximately 6,0% of total local potato production, was exported. The quantities of potatoes exported decreased from 173 770 tons in 2023. During 2024, 98,5% of total potato exports went to Africa.

*Source: *Customs and Excise*

Consumption

The total gross human consumption of potatoes increased by 5,8% and the per capita consumption increased by 1,9 kg to about 33,55 kg.

Year	**2020**	**2021**	**2022**	**2023**	**2024**
Total production ('000 tons)	2 669	2 595	2 532	2 416	2 555
Gross human consumption ('000 tons)	2 205	2 128	2 065	1 981	2 114
Per capita consumption (kg p.a.)	36,98	35,38	33,29	31,62	33,55

Prospects

It is expected that there will be an increase in the production of potatoes in 2025.

Viticulture

South Africa is the eighth-largest wine producer in the world. The area under wine grape vineyards is estimated at 86 544 ha, which is 1% less than the 87 848 ha of the previous year.

The wine industry is labour intensive and provides employment to approximately 270 364 people directly and indirectly. The number of primary wine grape producers in South Africa is estimated at 2 255.

Wine is produced mainly in Western Cape and along parts of the Orange River in Northern Cape.

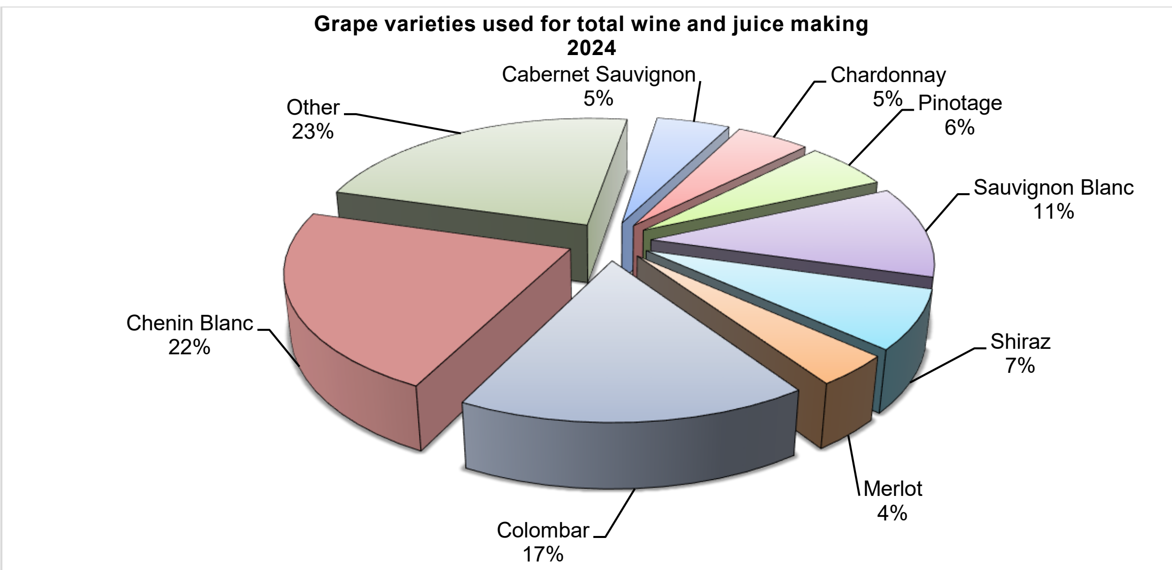
Production

Total production of wine, including rebate and distilling wine, juice and concentrate for non-alcoholic beverages from 2020 to 2024, is as follows:

Year	2020	2021	2022	2023	2024
	Gross million litres				
Wine production	1 042	1 133	1 068	933	884

During 2024, wine production decreased by 5%. Approximately 63% of the wine grapes utilised for winemaking purposes were white and 31% were red and the remaining was table grapes.

The use of different varieties of grapes during 2024 is depicted in the following graph:



Income of producers

The production of wine grapes and income of producers from 2020 to 2024 are as follows:

Year	**2020**	**2021**	**2022**	**2023**	**2024**
Wine-grape production ('000 tons)	1 342	1 460	1 376	1 183	1117
Income of producers (R million)	5 785	6 649	7 437	7 109	7941

The producers' income increased by 12% in 2024.

Total quantities of wine exported during the past five years are as follows:

Year	2020	2021	2022	2023	2024
	'000 litres				
Still wine	314 312	383 329	364 574	301 763	301 245
Fortified wine	221	229	246	185	230
Sparkling wine and Cap Classique	3 418	4 381	3 805	3 685	4655
Total	317 951	387 976	368 626	305 633	306 130

During 2024,306 129 600 litres of the total wine produced was exported, compared to 305 632 118 litres during 2023.

The following graph depicts wine export destinations during 2024.

Consumption

The per capita consumption of wine on the domestic market from 2020 to 2024 is as follows:

Year	**2020**	**2021**	**2022**	**2023**	**2024**
	ℓ per capita				
Still wine	4,62	5,93	6,70	6,48	6,11
Fortified wine	0,27	0,36	0,46	0,43	0,47
Sparkling wine	0,13	0,18	0,24	0,23	0,26
Total	5,02	6,47	7,40	7,14	6,84

Information and administration

The SA Wine Industry Information and Systems NPC (SAWIS), a non-profit company under control and direction of the South African wine industry, is inter alia responsible for the collection, processing and dissemination of industry information and for the administration of the industry's Wine of Origin system.

ANIMAL PRODUCTION

Livestock numbers

Extensive livestock farming is vast in the country, approximating four-fifths of the agricultural land in South Africa. However, livestock farming is also found were there are mixed farming enterprises.

Below-normal rainfall over the recent years has meant that the area involved in cattle, sheep and goat farming (approximately 590 000 km^2) has been negatively affected, further affecting grazing area which is 53% of all agricultural land in the country. Livestock conditions were reasonable to good in most provinces in recent years. Commercial sheep farms also occur in other areas such as the Kgalagadi, the winter rainfall area and the grasslands of Mpumalanga, as well as the eastern Free State and KwaZulu-Natal, with challenges of wild animals and stock theft threatening the successful farming thereof.

Foot-and-mouth disease is still prevalent in some parts of Limpopo, KwaZulu-Natal, Gauteng, North West and Free State, with movement restrictions in place for identified locations and biosecurity measures encouraged. Other diseases that continue to affect the industry are African Swine Fever, lameness and eye infections.

Cattle

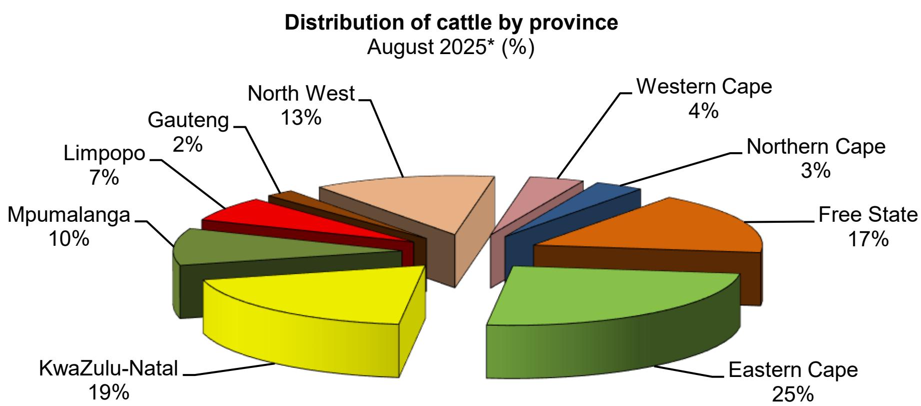
Cattle are found throughout the country, but mainly in Eastern Cape, KwaZulu-Natal, Free State and North West. Herd sizes vary according to type of cattle, ranging between less than 50 and 300 head of cattle for dairy, while beef cattle herds range from small (less than 20 head of cattle) to large farms and feedlots (more than 4 000 head). Some farms in North West and Gauteng have been found to have some of the largest cattle herds in the country. The production of weaners for the feedlot industry is the main form of cattle farming – feedlots account for approximately 75% of all beef produced in the country. Prices (R/kg) for weaners and live animals are lower for the first half of the year in comparison to 2018 (Source: SA Feedlot Association).

The total number of cattle in South Africa at the end of August 2025 is estimated at 12,122 million, comprising various international dairy and beef cattle breeds in addition to indigenous breeds such as the Afrikaner and the Nguni. The number is approximately 0,08% lower than the estimate of 12,123 million as at the end of August 2024. Beef cattle contribute approximately 80% to the total number of cattle in the country, while dairy cattle make up the remaining 20%. Holstein-Friesian, Jersey, Guernsey and Ayrshire are the four major dairy breeds found in South Africa.

Cattle numbers per province since 2021 are estimated as follows:

Province	2021	2022	2023	2024	2025*
	'000 (August)				
Western Cape	467	468	468	467	468
Northern Cape	419	419	418	426	420
Free State	2 030	2 062	2 061	2 052	2 051
Eastern Cape	3 068	3 045	3 048	3 007	3 003
KwaZulu-Natal	2 339	2 311	2 315	2 325	2 326
Mpumalanga	1 247	1 230	1 228	1 229	1 225
Limpopo	841	838	835	815	816
Gauteng	246	245	246	246	244
North West	1 576	1 580	1 580	1 556	1 560
Total	12 233	12 197	12 198	12 123	12 122

** Preliminary*

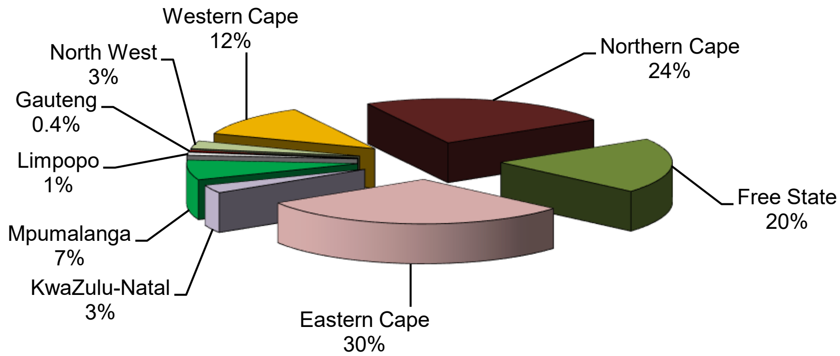


There are various breeders' organisations representing most international and indigenous cattle breeds. Most of the organisations are affiliated with the South African Studbook and Animal Improvement Association. The Milk Producers' Organisation (MPO) is the most prominent producer organisation in the South African dairy sector. The Red Meat Producers' Organisation (RPO) and the National Emergent Red Meat Producers' Organisation (NERPO) represent producers in the commercial and emerging agricultural sectors, respectively.

Sheep

Sheep farming is found in all provinces; but is mostly concentrated in the more arid parts of the country. The total number of sheep in South Africa at the end of August 2025 was estimated at 21,22 million, 0,11% lower than the estimated 21,24 million as at the end of August 2024. For August 2025, the largest number of sheep were estimated to be in Eastern Cape (30%), followed by Northern Cape (24%), Free State (20%) and Western Cape (12%).

Distribution of sheep by province
August 2025* (%)



Flock sizes vary between less than 50 and 1 800 animals. Sheep flocks in Eastern Cape, Western Cape and Northern Cape tend to be much larger than those in the other provinces, including Free State.

The animals are kept mainly for wool and mutton production and the industry is therefore represented by organisations from the mutton as well as the wool industry. The sheep industry also has various breeders' associations, with the Dorper Sheep Breeders' Society of South Africa and Merino SA being the most prominent. Western Cape, the inland Karoo and Overberg produce wool, mutton, and the pedigree Merino breeding stock.

The number of sheep in the various provinces since 2021 was estimated to be as follows:

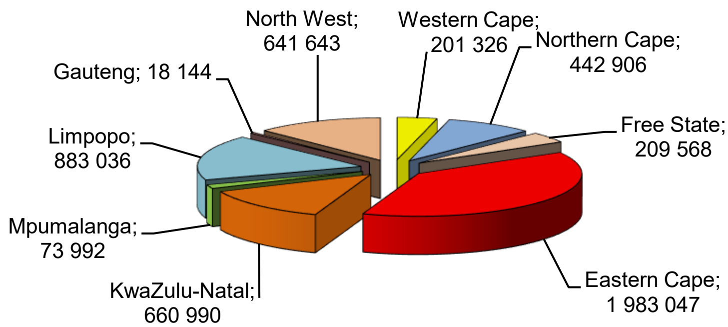
Province	2021	2022	2023	2024	2025*
	’000 (August)				
Western Cape	2 540	2 538	2 527	2 503	2 477
Northern Cape	5 172	5 149	5 147	5 101	5 087
Free State	4 309	4 314	4 310	4 278	4 272
Eastern Cape	6 442	6 434	6 414	6 335	6 320
KwaZulu-Natal	617	615	619	619	620
Mpumalanga	1 512	1 513	1 520	1 520	1 534
Limpopo	192	192	215	217	218
Gauteng	84	84	84	84	84
North West	596	593	589	583	605
Total	21 464	21 432	21 426	21 240	21 217

** Preliminary*

Goats

Goats are found mainly in Eastern Cape, Limpopo, KwaZulu-Natal and North West. Estimates indicate that there was an increase of 0,31% in the number of goats, from 5,10 million in August 2024 to 5,12 million in August 2025.

Distribution of goats by province
August 2025*



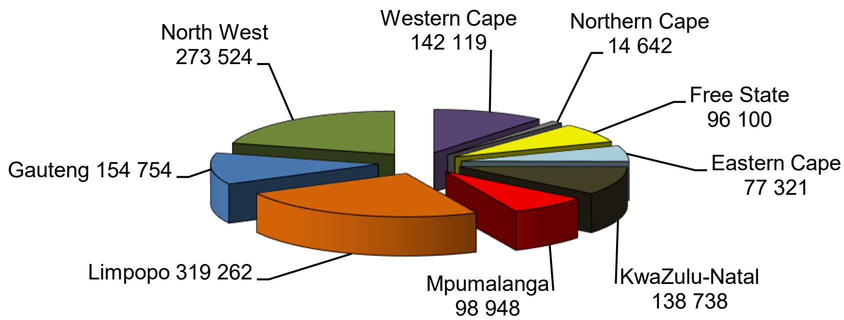
**Preliminary*

Flocks of goats intended for meat production are usually smaller than sheep flocks, averaging approximately 300 goats per farm. Angora goats are kept primarily for mohair production, while Boer goats are mainly for meat production. According to the SA Milch Goat Breeders' Society, there are also farmers who have adopted a market differentiating strategy by producing goat's milk and these are increasing in numbers.

Pigs

Pigs are found in high numbers in Limpopo, North West, Gauteng and Western Cape. There are approximately 400 commercial pork producers and 19 stud breeders in South Africa. It is estimated that pig numbers increased by 0,08%, from 1,32 million to 1,32 million between August 2024 and August 2025.

Distribution of pigs by province
August 2025*



**Preliminary*

The South African Pork Producers' Organisation (SAPPO) is the official mouthpiece for pork producers in South Africa. This organisation is primarily concerned with administration, liaison with government, the promotion of pork and pork products and matters of national interest such as health and research. The organisation is also concerned with consumer education, as well as business development for sustainable, economic viability and profit maximisation of producers.

According to SAPPO, most pork meat imports originate from Europe and Brazil, while a few SA neighbouring countries are export destinations. The total number of employees in the formal pork production industry in South Africa is estimated to be approximately 10 000, comprising about 4 000 farm workers and 6 000 workers in the processing and abattoir sectors.

Red meat

The red meat industry is one of the most important growing industries in the South African agricultural sector. It contributed approximately 14,5% to the gross value of agricultural production in the RSA during 2024/25. While sheep farming is mainly extensive, a large percentage of beef animals are supplied by feedlots.

Livestock slaughtering

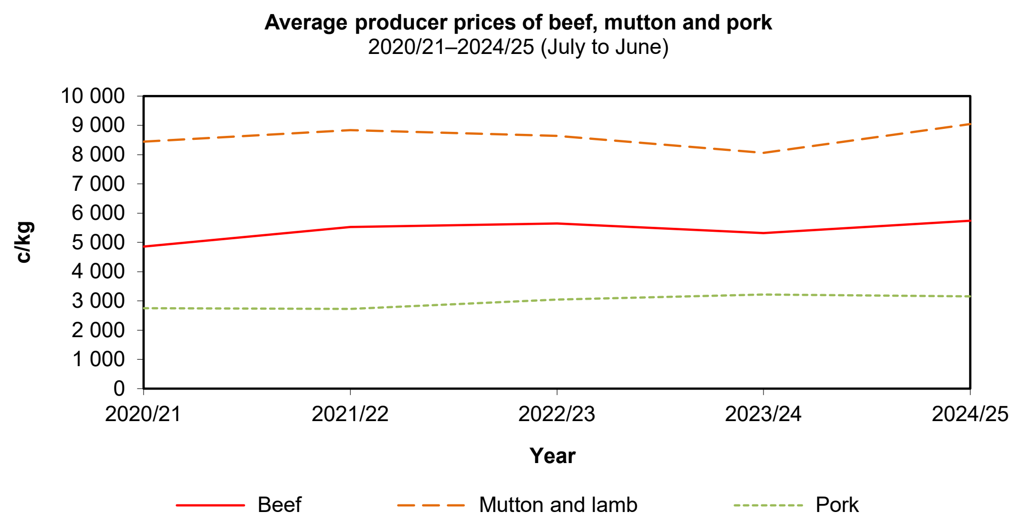
It is estimated that the total number of cattle slaughtered increased by 6,4%, sheep (including lambs) slaughtered increased by 9,2% and pigs slaughtered increased by 1,5% from 2023/24 to 2024/25.

Commercial slaughtering of red meat producing livestock categories over the past five years were as follows:

Year	2020/21	2021/22	2022/23	2023/24	2024/25
Cattle	2 629 884	2 579 624	2 535 801	2 614 916	2 783 121
Sheep and lambs	3 920 889	3 860 627	3 919 679	4 023 561	4 392 581
Pigs	3 396 979	3 739 291	3 855 546	3 764 833	3 821 580

Auction prices

The prices for red meat are mainly determined by the interaction between demand and supply (the latter two are affected by the level of the consumers' disposable income, the prices of substitute products and import parity prices, etc.). In the case of mutton, for example, the level of wool prices also influences the domestic supply of mutton.



In view of the ever-strong influence of international trade on the local mutton industry, both the cyclical and seasonal price patterns for mutton were influenced by imports. The average producer price for mutton increased by 12,2%, from R80,60/kg in 2023/24 to R90,44/kg in 2024/25.

The average producer price for beef increased by 7,9%, from R53,21/kg to R57,40/kg in 2024/25. The average producer price for pork decreased by 2,1%, from R32,17/kg in 2023/24 to R31,51/kg in 2024/25.

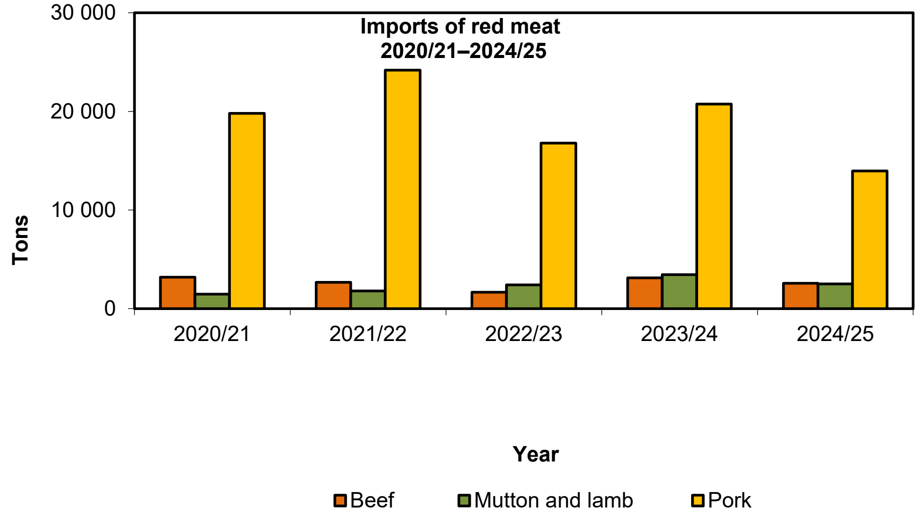
Imports

Imports of red meat decreased by 30,2%, from 27 300 tons in 2023/24 to 19 062 tons in 2024/25 (20,8% lower than the average of approximately 24 064 tons for the five years up to 2024/25).

Beef imports amounted to 2 573 tons in 2024/25, which is a decrease of 17,7% from the 3 127 tons imported during 2023/24 and 2,6% lower than the five-year average of 2 642 tons up to 2024/25.

Imports of pork amounted to 13 977 tons in 2024/25, a decrease of 32,6% from the 20 736 tons imported during 2023/24 and 26,8% lower than the five-year average of 19 095 tons up to 2024/25.

Imports of mutton during 2024/25 amounted to 2 511 tons, a decrease of 26,9% from the 3 437 tons imported the previous year and 8,0% higher than the average of 2 326 tons for the five years up to 2024/25.



Poultry

The poultry industry consists of the day-old chick, the broiler and the egg supply. The South African Poultry Association (SAPA) represents both commercial and non-commercial poultry farmers within these three subsectors.

This article focuses on the broiler and the egg industry, as the chick supply is an input into both.

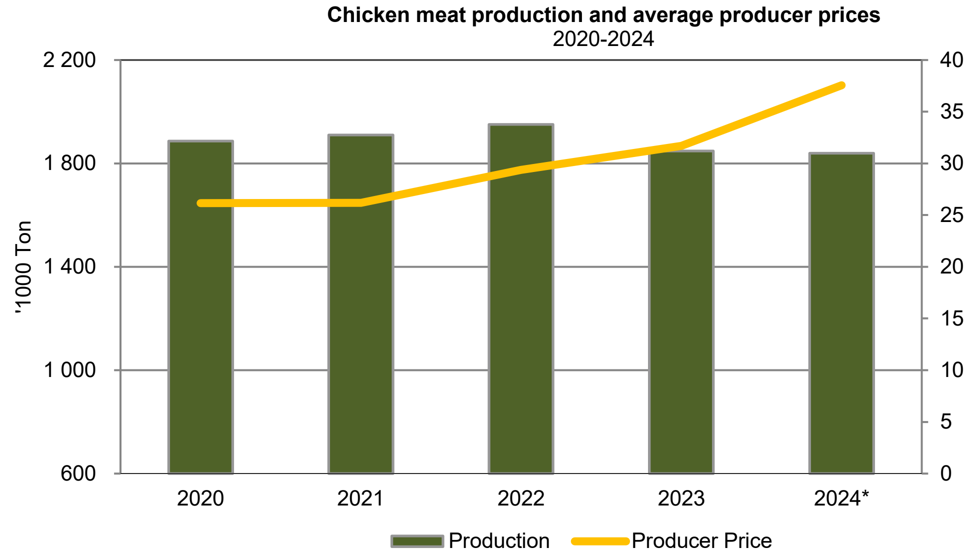
Broiler industry

The broiler industry continues to dominate the agricultural sector in South Africa as the main supplier of animal protein.

Production

The distribution of broiler birds (including broiler breeders) per province is as follows: North West (23,4%), Mpumalanga (19,7%), Western Cape (16,5%), Gauteng (12,0%), Free State (10,3%), KwaZulu-Natal (8,1%), Eastern Cape (6,2%), Limpopo (3,4%) and Northern Cape (0,2%).

In 2024, a total of 1 174 million-day-old chicks were hatched, an increase of 5,5% compared to the previous year. The average number of broilers slaughtered for commercial markets during 2024 was estimated at 1 113,3 million. This is 4,7% less than the 1 063,4 million slaughtered during 2023. Annual production of chicken meat totalled 1,897 million tons in 2024. This includes broilers for commercial markets, production by subsistence farming and meat from the sale of spent broiler breeder hens and cocks and spent hens from the egg industry.



* Expected production for 2025 and average producer price for the first nine months of 2025

Prices received by producers

The average weighted basic gross price (before rebates, advertising and distribution costs are deducted) received by producers of broilers increased by 2,7%, from R31,83/kg in 2024 to R32,68/kg in 2025.

Average weighted producer prices of broilers from 2021 to 2025 are as follows:

Year	**2021**	**2022**	**2023**	**2024**	**2025***
	R/kg				
Price of broilers	26,18	29,36	31,70	31,83	32,68

** Preliminary: January to September 2025*

Consumption

Consumption of poultry meat accounted for 63,0% of the total meat consumed (beef, mutton, goat, pork and poultry) in 2024 compared to 62,6% of the previous year. The per capita consumption of poultry meat decreased slightly by 1,1%, from 35,4 kg in 2023 to 35,8 kg in 2024.

Per capita consumption of commercially produced poultry meat from 2020 to 2024 is as follows:

Year	2020	2021	2022	2023	2024
	kg/year				
Per capita consumption	38,7	38,0	36,5	35,4	35,8

Imports

In 2024, poultry imports totalled 415 091 tons, a year-on-year slight increase of 116 tons, or 0,03%. The value of imports amounted to R5,4 billion.

Brazil was the main country of origin of imports in 2024, accounting for 81,3%, or 337 602 tons of total poultry imports into South Africa. The EU was the second-largest importer with 7,7%, followed by Argentina with 6,2%. The USA contributed 3,3% to total poultry imports.

Prospects

The forecasting model used to predict broiler breeder bird numbers and number of broilers slaughtered was updated in 2023. The hatcheries projected 22,45 million chicks per week, which is a decreased by 5,2% as compared to the 21,34 million during 2023. Based on the number of day-old parent pulled placed, the size of the breeder laying flock is expected to decrease by 1,8% or 6,61 million during the first four months of 2025.

Egg industry

Based on information provided by SAPA, the distribution of layers per province is as follows: North West (21,4%), Mpumalanga (17,8%), Western Cape (16,9%), Gauteng (14,0%), Free State (11,3%), KwaZulu-Natal (8,6%), Eastern Cape (5,6%), Limpopo (4,2%) and Northern Cape (0,2%).

The number of layers increased by 18,3%, from 21,31 million in 2023 to 25,20 million in 2024. An average flock of 24,26 million layers is projected for the first four months of 2025; this will be an increase of 3,7% compared to the same period in 2024.

The average price received by egg producers during 2025 was 16,8% more than the average price received during the same period of 2024.

The average weighted producer prices of eggs from 2021 to 2025 are as follows:

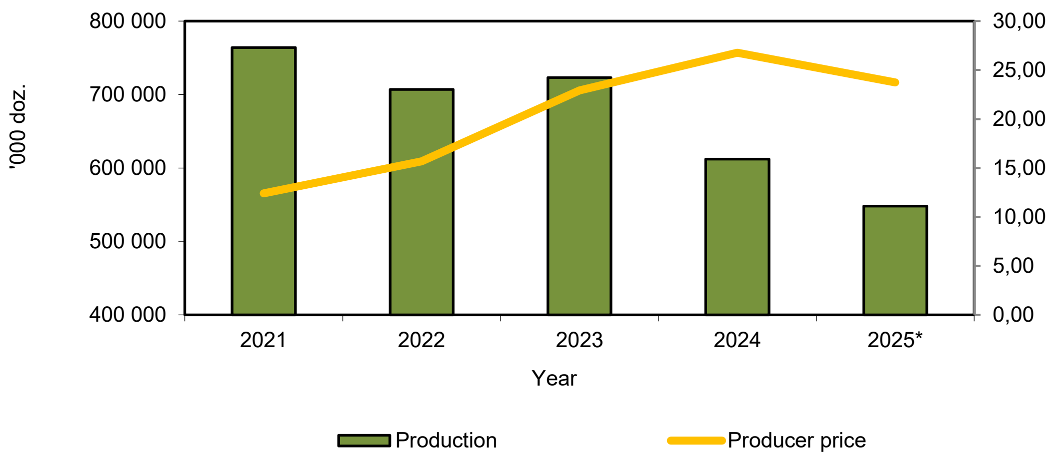
Year	2021	2022	2023	2024	2025*
	R/dozen				
Price of eggs	12,41	15,69	22,93	26,77	23,73

** Preliminary: January to September 2025*

Production

Egg production showed a year-on-year decrease of 10,7% in 2024. The average number of cases produced per week was 349 600 compared to 391 400 cases per week in 2023. The total production of eggs for human consumption in 2024 was 548 million dozen, a decrease of 10,5% as compared to 612 million dozen of the previous year.

Production of eggs and prices received by producers
2021–2025



* *Preliminary: January to September 2025*

Consumption

The per capita consumption in 2024 was 106,3 eggs or 6,49 kg compared to 148,2 eggs or 9,06 kg in 2023. During 2024, the annual turnover was R14,63 million, an increase of 4,6% as compared to R14,08 million in 2023. Eggs are still an affordable animal protein source compared to meat.

Prospects

New breed standards have been applied to the model, and the laying cycle has been extended by up to 78 weeks. These changes resulted in an increase in the estimated size of the national laying flock in terms of the number of egg cases produced and the mean egg weight. Hen numbers decreased from 23,28 million at the end of December 2023 by 10,6%, or 20,81 million, during the same period of 2024. Consequently, egg production is expected to increase by 16,0%, or 408 300 cases per week, during the first four months of 2025.

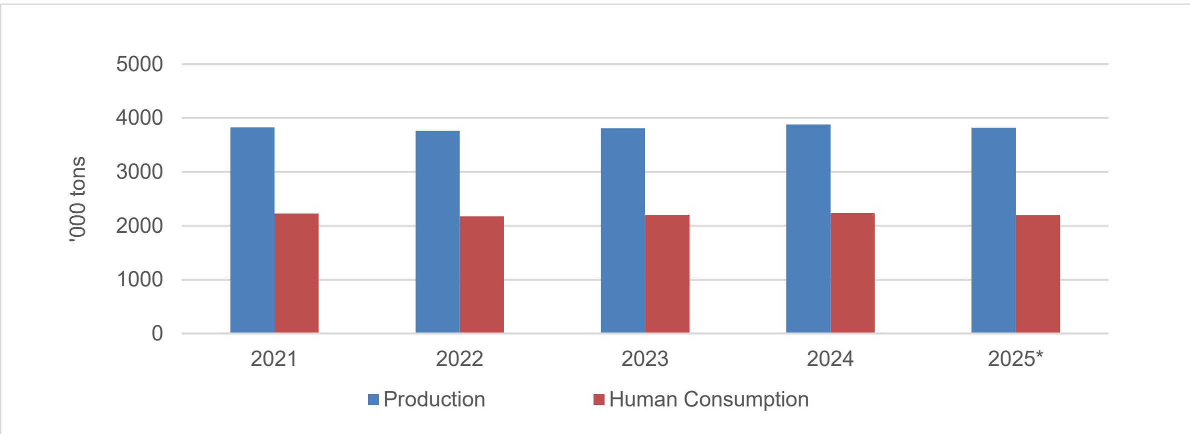
Milk

Milk production in South Africa is concentrated mainly in the coastal regions, especially the Eastern Cape, Western Cape, and KwaZulu-Natal. These areas have mild temperatures and reliable rainfall, which provide good conditions for both natural and cultivated pastures. According to Milk South Africa, approximately 85,0% of South Africa's milk production originates from the Eastern Cape, Western Cape, and KwaZulu-Natal provinces, while the remaining 15,0% is produced in the Free State, Mpumalanga, Gauteng, North West, and Limpopo provinces. Since 2018, the number of milk producers has declined at an average annual rate of 7.4%, yet overall milk production has remained stable

South Africa's milk industry is among the smallest globally, contributing only 0,4% to total world milk production. However, in South Africa, it ranks as the seventh-largest agricultural industry in terms of production value.

In 2024, the gross value of milk production, including milk for producers' own consumption and on-farm use, was estimated at R28,336 million, representing a 2,5% increase from R27,639 million in 2023. The 2,5% increase in the gross value of milk production in 2024 was driven by a 1,9% rise in production volumes and a 1,0% increase in the average producer price.

The graph below depicts total milk production and human consumption of milk from 2021 to 2025.



Source: Milk SA and DoA

**Preliminary*

Production remained stable at 3,8 million tons from 2021 to 2025, while human consumption was steady at 2,2 million tons, with a slight decline in 2022. The annual surplus of 1,7 million tons shows that over 40,0% of production is not directly consumed by humans. Production in 2025 appears positive and confirms continued stability in supply and demand.

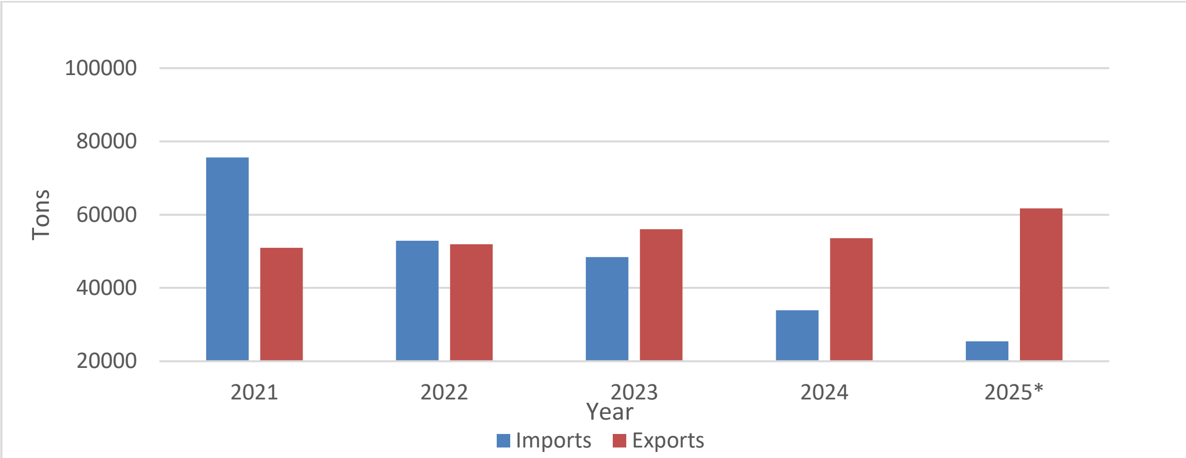
Prices

Milk producer prices increased by 32,3% from 5,66 c/ℓ in 2021 to 7,58 c/ℓ in 2024. Growth was 14,1% in 2022, 14,9% in 2023, and slowed to 2,2% in 2024. On average, prices increased by about 10,4% per year between 2021 and 2024. Milk producer prices averaged 720 c/ℓ in the first half of 2025, which is 4,8% lower than the 756 c/ℓ in the same period of 2024, with the full-year average projected to be about 2–3% lower than 2024.

Production season	2021	2022	2023	2024	2025*
	c/ℓ				
Average producer price	566	646	742	749	720

** Preliminary: January to June*

Imports and exports of milk and milk products



Source: SAMPRO

**Estimates*

In 2021, South Africa imported 76,189 tons of milk and milk products against exports of 50,991 tons, with imports 49,4% higher. From 2022 the country became a net exporter, with exports exceeding imports by 8,2% in 2022, 55,6% in 2023 and 60,6% in 2024. In the first half of 2025, exports were 61,702 tons compared with imports of 25,451 tons, a gap of 142,4%.

Wool

Areas of production

Wool is produced throughout South Africa; however, the main production areas are in the drier regions of the country. Based on annual sales of producer lots, Eastern Cape was the largest wool-producing province during 2024/25 with 15,2 million kg, followed by Free State with 8,2 million kg, Western Cape with 7,6 million kg, Northern Cape with 5,3 million kg and Mpumalanga with 1,8 million kg, while 1,2 million kg were produced in the remaining four provinces.

Production

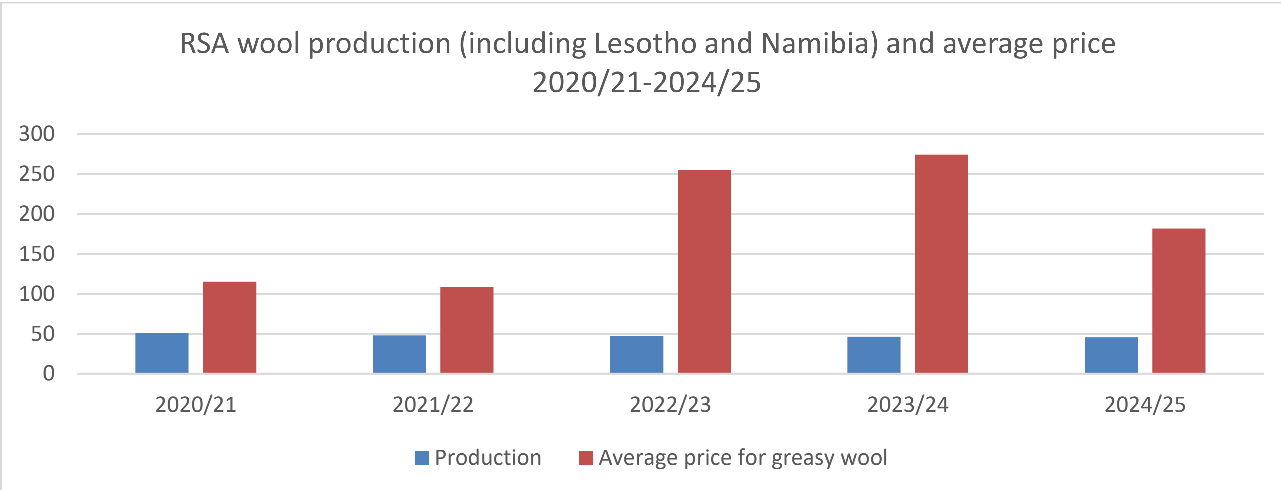
South Africa, like Australia, produces mainly apparel wool, while the bulk of the wool of the other major producers, such as New Zealand, China, Uruguay and Argentina, is the coarse type used in the manufacturing of carpets and interior textiles. The main fibres competing with wool are cotton and man-made fibres such as polyester, nylon and acrylic.

Total receipts for 2024/25 decreased to 45,5 million kg, a decrease of 1,9% from 2023/24, while Lesotho producer's volumes have increased by 1, 4%.

Marketing

An excess of 90% of all greasy wool sold in South Africa is traded by means of weekly auctions taking place from August to June. Normally, there is considerable volatility in prices during and between auctions. The price of wool is determined by a complex set of variables, including the level of the market in Australia on a specific day, exchange rate fluctuations, quantities offered for sale at auctions, the specific demand for different wool types at various times, the extent and timing of contract commitments by local buyers for delivery to clients and the prevailing economic conditions in wool-consuming countries.

South Africa produces mainly a Merino clip, which comprises more than 80% of all lots offered for sale. Mean fibre diameter is the major price determinant for Merino wool, with finer micron categories normally commanding a premium over medium and strong wool.



Marketing arrangements

Wool marketing in South Africa is free from statutory intervention. Wool is traded primarily via the open-cry auction system. Wool auctions are centralised in Port Elizabeth and runs from August of one year to June the next year. Alternative selling mechanisms, such as contract growing, forward deliveries and futures, have not been established in the South African wool industry.

The global price for apparel wool is determined in Australia, where the largest volumes of wool are traded. South Africa, with its small clip, is therefore a market follower or price-taker.

Numerous sellers and few buyers are typical of wool auctions. Buyers normally must compete for wool over a number of auctions to make up processing batches to meet their clients' contract specifications in terms of price, quantity and delivery date. Contracts in foreign currencies, such as the euro or the US dollar, must be converted into buying limits in rand and the buyer carries the risk.

Cape Wools of South Africa promotes the interests of the South African wool industry. It is a non-profit company established and owned by farmers and other directly affected industry groups registered with the Wool Forum, which represents all role players in the industry. The board of directors proportionately represents these groups. Cape Wools started operating on 1 September 1997.

Cape Wools' service portfolio comprises market information and statistics; research and development; transfer of wool production and promotion of wool. The Wool Trust, comprised of funds transferred from the former Wool Board, funds Cape Wools.

Exports

Wool is an export product with approximately 94% of total production being shipped overseas, in either greasy or semi-processed form (scoured and wool top). Main export destinations for the year under review were China, the Czech Republic and Italy.

During 2024/25, the major export destinations for South African wool were as follows:

Wool shipments to the five top export destinations – July 2024 to June 2025								
Country	Greasy		Scoured		Top and noils		Total	% of total FOB value
	Value R1 000	Volume Kg	Value R1 000	Volume Kg	Value R1 000	Volume Kg	Value R1 000	
China/Macau/ Hong Kong	3 220 325	35 920	0	0	0	0	3 220 325	79,9
Czech Republic	837 072	5 344	0	0	0	0	837 072	12,5
India	136 845	1 464	0	0	0	0	136 845	3,5
Italy	181 496	1 377	0	0	0	0	181 496	3,0
Bulgaria	15 201	150	0	0	0	0	15 201	0,3

Outlook

South African wool industry is significantly impacted by foot-and-mouth disease outbreaks, causing temporary imports bans, particularly from China and its major buyer of SA wool.

Mohair

Production

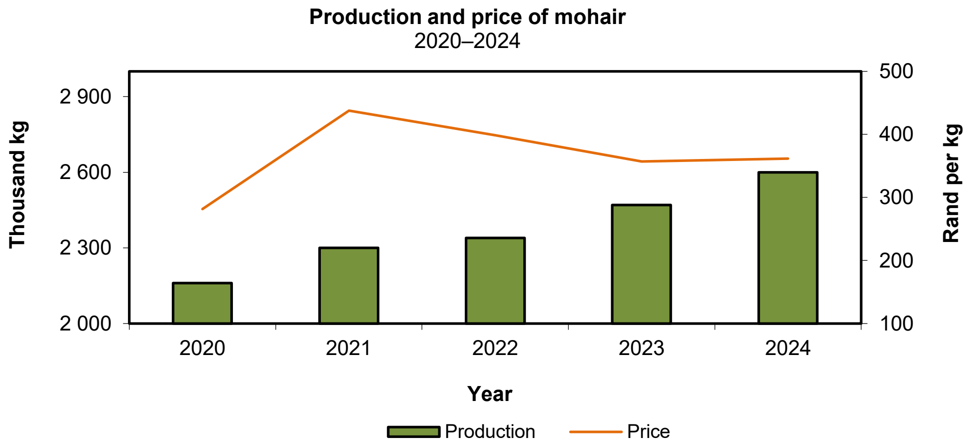
Mohair production in South Africa is largely concentrated in the Eastern Cape province, with smaller scale production taking place in some parts of the Western Cape. South Africa is the world's largest producer of mohair, accounting for more than half of global production. Mohair is obtained from Angora goats and is a unique natural fibre used in high-quality textiles such as luxury garments, carpets, and upholstery.

In 2024, mohair production in South Africa increased by 5,3% to 2,60 million kilograms, up from 2,47 million kilograms in 2023. The growth in mohair production in 2024 may be partly attributed to stronger market prices, particularly for high-quality kid mohair, which provided an incentive for farmers to increase output.

The summary below depicts South Africa's mohair production for the period 2020 to 2024:

Year	**2020**	**2021**	**2022**	**2023**	**2024**
	Million kg				
Production	2,16	2,30	2,34	2,47	2,60

Prices



Between 2020 and 2024, South Africa's mohair production increased by approximately 20,0%, rising from 2,160 to 2,600 kilograms, while prices fluctuated during the same period. The sharp price increase in 2021 may have encouraged farmers to expand herds, supporting steady growth in production in the following years, even as prices declined after 2022.

Mohair prices in South Africa increased sharply from R281,62/kg in 2020 to a peak of R437,75/kg in 2021, before declining to R398,69/kg in 2022 and R356,94/kg in 2023. In 2024, prices showed a slight recovery, averaging R361,61/kg, but remained well below the 2021 high.

Average auction prices of mohair for the period 2020 to 2024 are as follows:

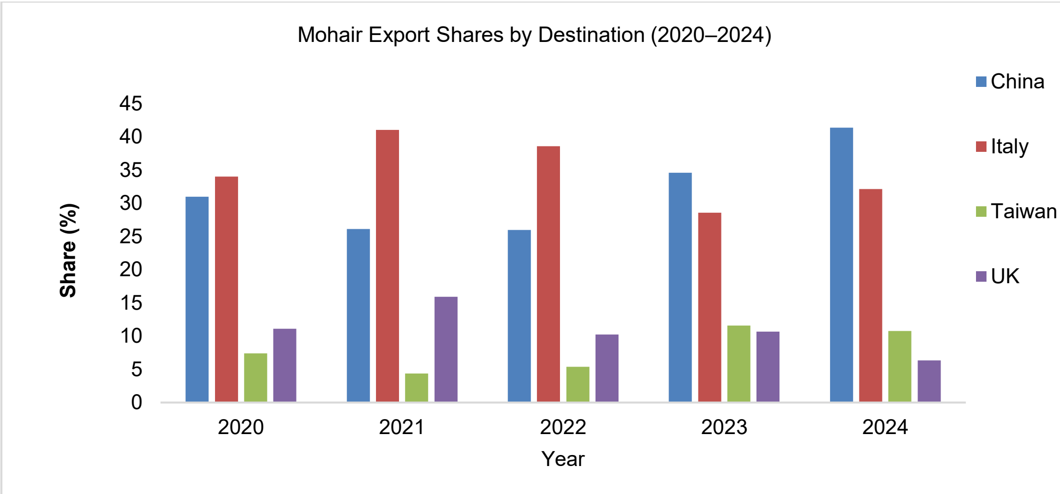
Year	**2020**	**2021**	**2022**	**2023**	**2024**
	R/kg				
Price	281,62	437,75	398,69	356,94	361,61

Imports and exports

In 2024, South Africa's mohair exports were largely directed to a few main international markets**.** Italy and China remained the dominant destinations, accounting for 70% of total exports. From 2020 to 2024, China became the biggest buyer of South African mohair (41,0%)**,** while Italy's share fell to 32,0%**.** Taiwan remained steady at about 10,0% and the UK dropped to only 6,0%**.**

South Africa's mohair imports are minimal compared to exports, as the country is a leading global producer and exporter of raw mohair rather than an importer.

The chart below shows the percentage share of mohair exports by the major destinations (China, Italy, Taiwan, and UK) between 2020 and 2024.



Prospects

The outlook for South Africa's mohair industry is expected to be positive, with exports remaining strong in key markets such as China and Italy, as supported by international demand. Production has been gradually increasing, ensuring a steady supply to meet export needs. Prices are expected to remain stable, with chances to improve if demand grows.

Imports, on the other hand, remain very small, as South Africa continues to focus on its role as a leading global producer and exporter of mohair.