agriculture
Department:
Agriculture
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Agro-processing Quarterly Brief: No. 3, 2025

Directorate: Agro-processing Support

Highlights of the third quarter of 2025 (2025: Q3) (July to September)

In 2025: Q3, the year-on-year producer price index for final manufactured goods, the producer price index for all items, rose by 1,9% from a growth of 0,4% recorded in 2025: Q2.

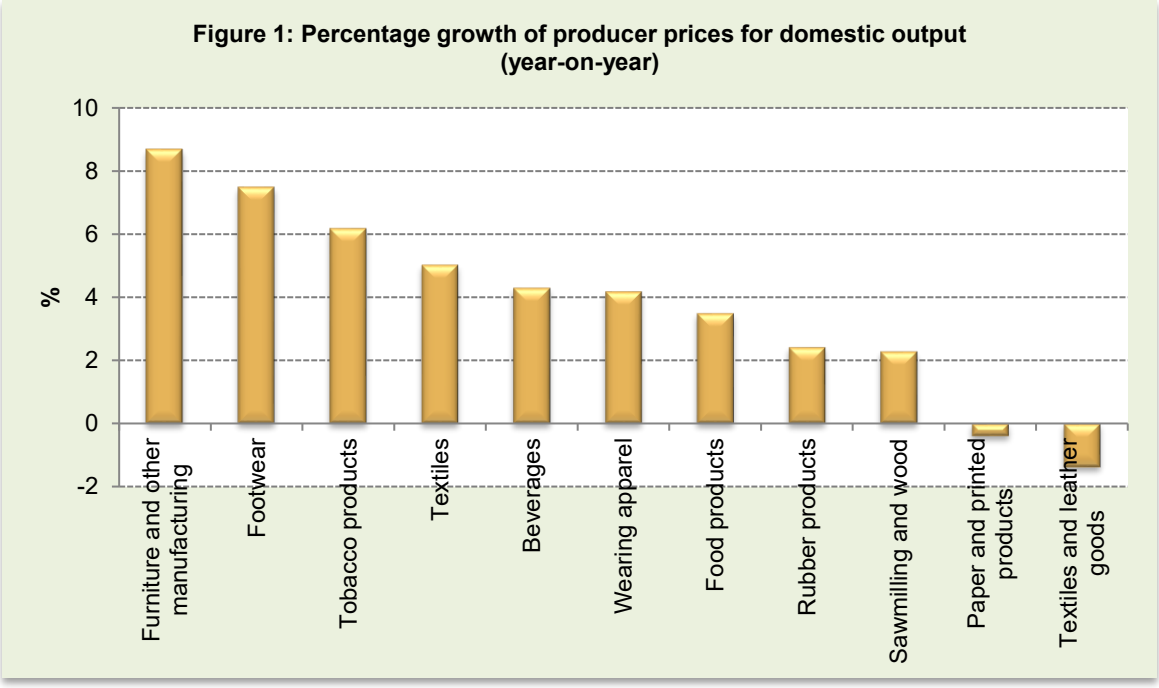
The agro-processing industry's seasonally adjusted volume of production decelerated by 0,4% in 2025: Q3 from a 0,1% contraction registered in 2025: Q2.

The quarter-to-quarter seasonally adjusted value of sales for the agro-processing industry rose by 0,5% in 2025: Q3 from a 1,9% growth in 2025: Q2, representing an increase in nominal value of sales from R298 704,0 million in 2025: Q2 to R300 243,6 million in 2025: Q3.

In 2025: Q3, the exports of the agro-processing sector moderated by 2,8% quarter-to-quarter, while imports rebounded by 14,7%, as a result, the trade deficit widened from R6 565,8 million in 2025: Q2 to R13,909,6 million in 2025: Q3.

In 2025: Q3, the agro-processing industry recorded about 460 044 jobs from 462 719 jobs in 2025: Q2, representing 2 675 jobs shed in 2025: Q3.

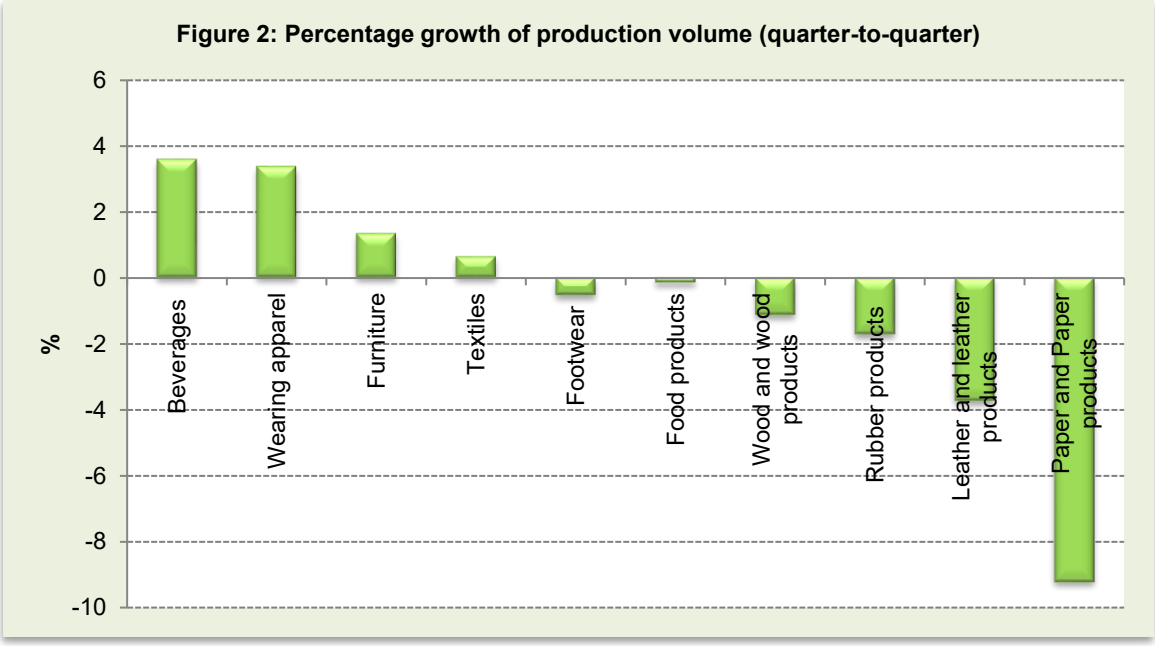
Producer prices



Source: Statistics SA, 2025

In 2025: Q3, the year-on-year producer price index for all items rose by 1,9% from a growth of 0,4% in 2025: Q2, however, the producer price index of most items remained unchanged in the period under review, and those were: footwear (7,5%), tobacco products (6,7%), textiles (5,0%) and rubber products (2,4%). Furniture and other manufacturing (8,7%), wearing apparel (4,2%) and food products (3,5%) moderated, beverages (4,3%) and sawmilling and wood (2,3%) expanded, while paper and paper products (0,4%) receded further and textiles and leather goods (1,4%) contracted in 2025: Q3 (see Figure 1).

Volume of production

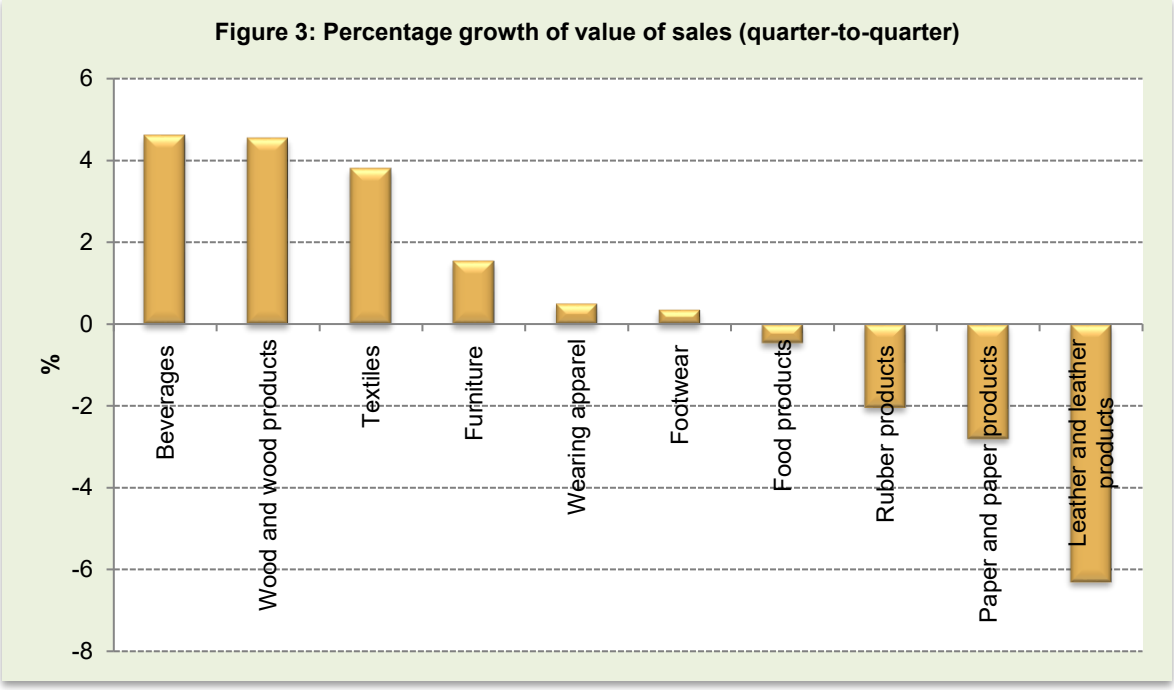


Source: Statistics SA, 2025

**Tobacco data not supplied*

Figure 2 above shows the seasonally adjusted physical volume of production for the agro-processing divisions in 2025: Q3. The agro-processing industry's quarter-to-quarter seasonally adjusted volume of production decelerated by 0,4% in 2025: Q3 from a 0,1% contraction in 2025: Q2. Most divisions receded further during the period under review, and those were: footwear (0,5%), food products (0,2%), wood and wood products (1,1%) and rubber products (1,7%); however, furniture (1,3%) and textiles (0,6%) moderated, leather and leather products (3,7%) and paper and paper products (9,2%) contracted, beverages expanded (3,6%), while wearing apparel rose by 3,4% in 2025: Q3.

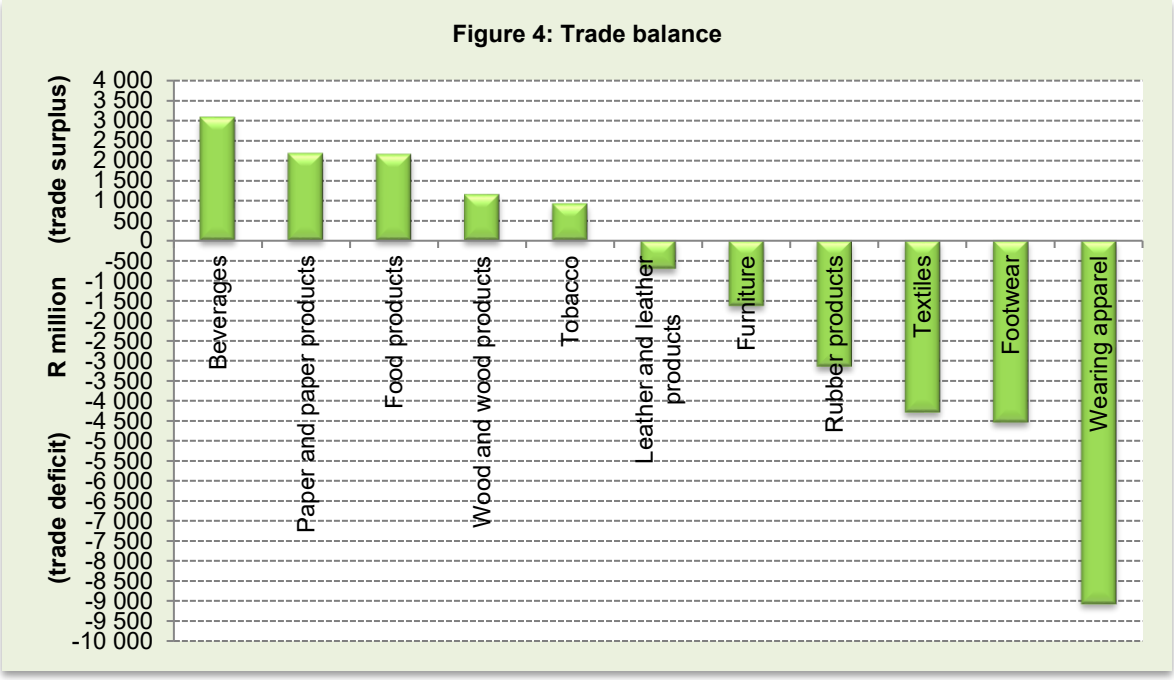
Value of sales



Source: Statistics SA, 2025

Figure 3 above shows the seasonally adjusted value of sales for the agro-processing divisions in 2025: Q3. The quarter-to-quarter seasonally adjusted value of sales for the agro-processing industry rose by 0,5% in 2025: Q3 from a 1,9% growth in 2025: Q2. This represented an increase in nominal value of sales from R298 704,0 million in 2025: Q2 to R300 243,6 million in 2025: Q3. The seasonally adjusted value of sales rebounded for the following divisions: wood and wood products (4,5%), wearing apparel (0,5%) and footwear (0,3%); however, beverages (4,6%) and textiles (3,8%) rose, furniture (1,5%) moderated, food products (0,5%) and leather and leather products (6,3%) contracted, while rubber products (2,0%) and paper and paper products (2,8%) decelerated in 2025: Q3.

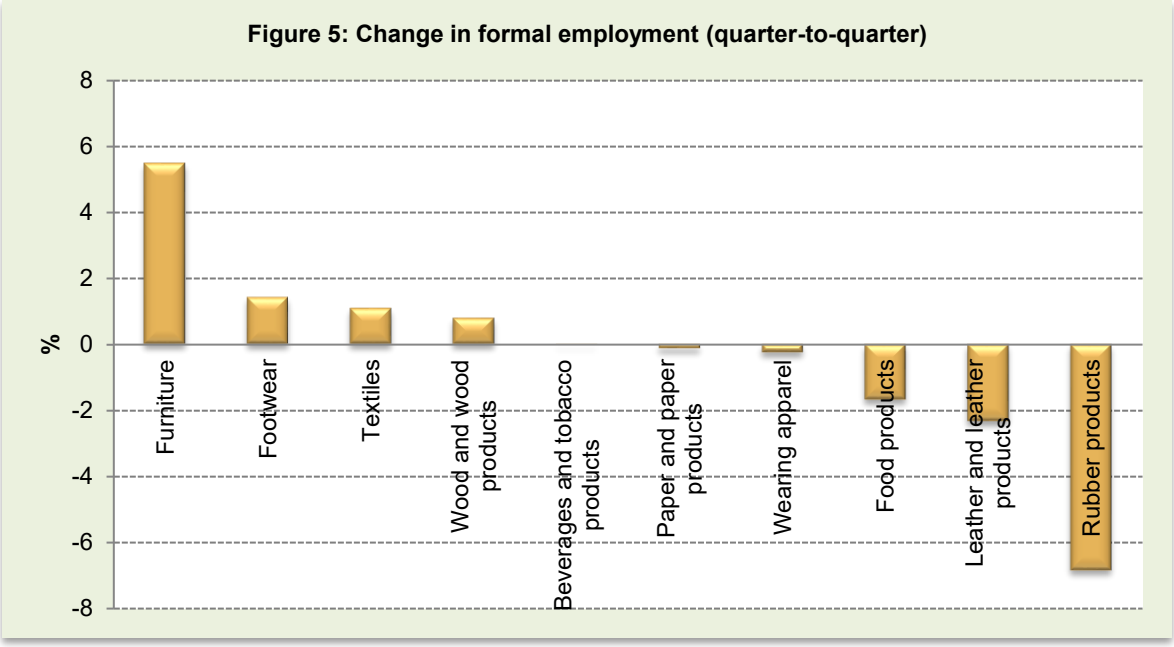
Trade



Source: Quantec, 2025

In 2025: Q3, the exports of the agro-processing sector moderated by 2,8% quarter-to-quarter, while imports rebounded by 14,7%, as a result, the trade deficit widened from R6 565,8 million in 2025: Q2 to R13,909,6 million in 2025. The divisions that recorded a trade deficit during the period were: wearing apparel (R9 065,5 million), footwear (R4 543,9 million), textiles (R4 292,8 million), rubber products (R3 152,6 million), furniture (R1 635,5 million) and leather and leather products (R707,6 million). However, the following divisions recorded a trade surplus: tobacco (R924,5 million), wood and wood products (R1 155,8 million), food products (R2 151,1 million), paper and paper products (R2 175,8 million) and beverages (R3 081,1 million) in 2025: Q3 (see Figure 4).

Formal employment



Source: Stats SA, 2025

In 2025: Q3, the agro-processing industry recorded about 460 044 jobs from 462 719 jobs in 2025: Q2, representing 2 675 jobs shed in 2025: Q3. The following divisions rebounded during 2025: Q3: furniture (5,5%), textiles (1,1%), wood and wood products (0,8%), wearing apparel (0,3%) and leather and leather products (2,3%) receded further, footwear (1,5%) moderated, paper and paper products (0,1%) and food products (1,7%) contracted, rubber products (6,8%) decelerated, while beverages and tobacco remained unchanged as compared to a contraction of 28,0% in the last quarter (see Figure 5).

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