



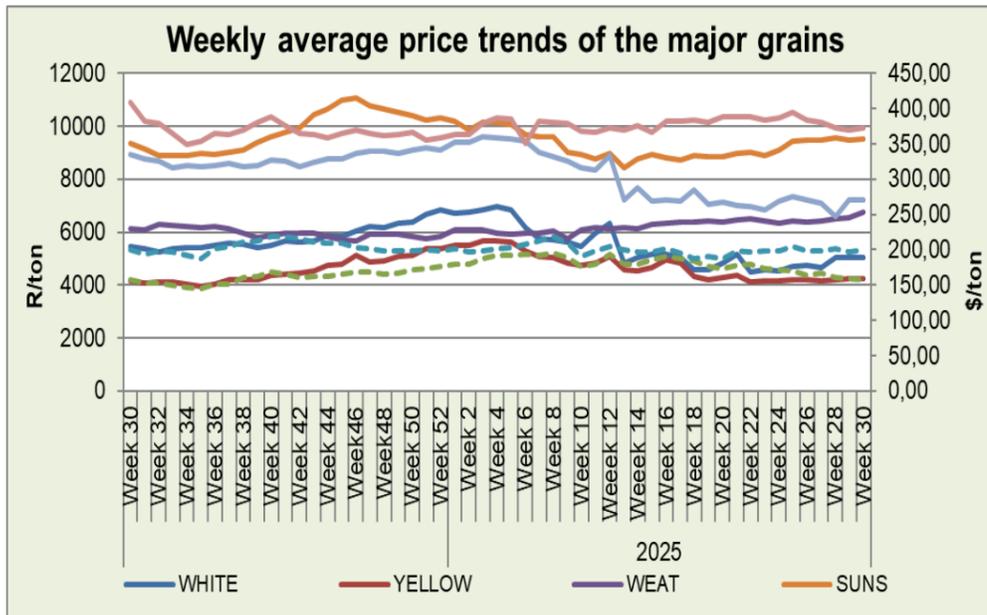
agriculture

Department:
Agriculture
REPUBLIC OF SOUTH AFRICA

Weekly Price Watch: 25 July 2025

Directorate: Statistics & Economic Analysis

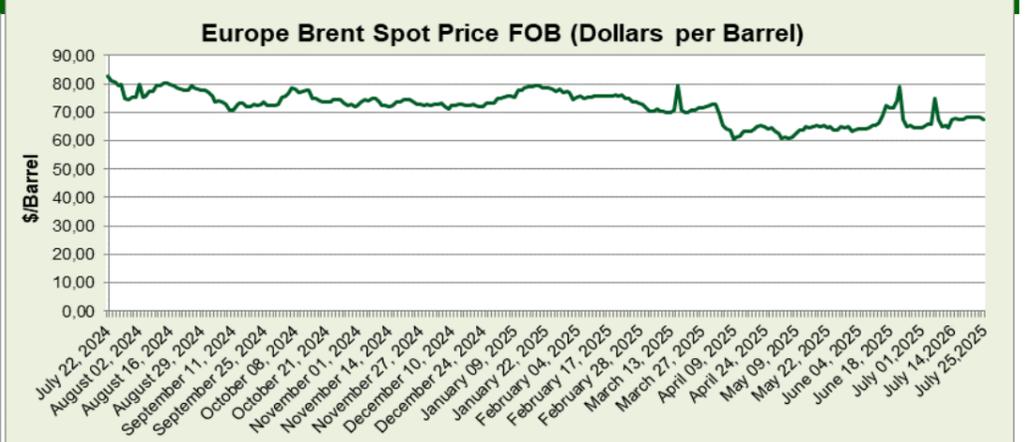
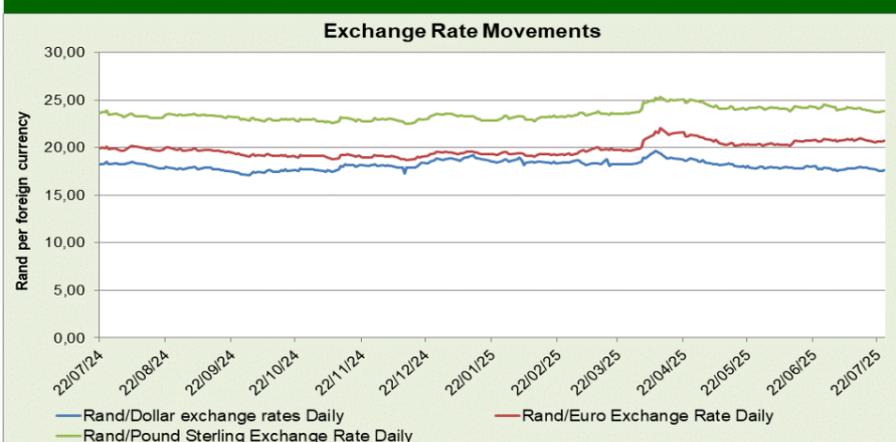
Sub-directorate: Economic Analysis



The international and local grain markets showed mixed performance during the reporting week, with only domestic yellow maize and US corn saw a decline in their prices. Domestically, the average spot prices of white maize, wheat, soybeans and sunflower recorded week-on-week increases of 0.02%, 2.9%, 0.1% and 0.4% respectively; meanwhile, yellow maize prices went down by 0.2%. Internationally, the price of US yellow maize recorded week-on-week decline of 0.6%, while the price of US wheat and US soybeans, increased by 1.2%, 0.6% respectively. American farmers have completed the planting season, and crops are now entering their early growth stages. Weather conditions in the coming weeks will play a critical role in determining yield potential. Favourable weather will support healthy development, while adverse conditions during this period can negatively affect key crops, particularly corn and soybeans, ultimately influencing market prices.

Spot price trends of major grains commodities

	1 year ago Week 30 (22-07-24 to 26-07-24)	Last week Week 29 (14-07-25 to 18-07-25)	This week Week 30 (21-07-25 to 25-07-25)	w-o-w % change
RSA White Maize per ton	R 5447,20	R 5 048,00	R 5 048,00	0,02%
RSA Yellow Maize per ton	R 4153,80	R 4 257,20	R 4 247,80	-0,22%
USA Yellow Maize per ton	\$157,68	\$159,36	\$158,35	-0,63%
RSA Wheat per ton	R 6111,60	R 6 566,00	R 6698,00	2,91%
USA Wheat per ton	\$199,72	\$197,48	\$199,85	1,20%
RSA Soybeans per ton	R 8936,20	R 7 206,80	R 7 214,40	0,11%
USA Soybeans per ton	\$408,53	\$369,70	\$372,04	0,63%
RSA Sunflower seed per ton	R 9369,80	R 9 471,20	R 9 509,20	0,40%
Crude oil per barrel	\$80,74	\$67,74	\$68,05	0,45%



The South African rand depreciated against all major currencies this week compared to the previous week, weakening by 1.53% against the US dollar, 0.92% against the euro, and 0.97% against the British pound. Markets are seeing some uncertainty on the approach of 1st August US tariff deadline. There is considerable debate regarding how the American economy might fare with higher tariffs.

During the reporting week, the average prices of Brent crude oil increased by 0.45% and averaged \$68.05 this week compared to \$67.74 reported in the previous week. Expectations of broader global trade agreements have lifted prospects for global economic growth, boosting oil demand and supporting prices. The Signs of strong demand in the US, the world's largest oil consumer, also helped push prices higher.



National South African Price information (RMAA) : Beef

Week 28 (07/07/2025 to 13/07/2025)	Units	Avg Purchase Price	Avg Selling Price	Week 14 (14/07/2025 to 20/07/2025)	Units	Avg Purchase Price	Avg Selling Price
Class A2	10385	70,83	74,16	Class A2	11070	70,08	74,05
Class A3	535	69,49	75,24	Class A3	436	67,4	74,7
Class C2	1971	56,08	59,73	Class C2	1755	56,02	58,31

Beef weekly average prices declined across the different classes. Weekly average selling prices for class A2, A3 and C2 beef decreased by 0.1% , 0.7% and 2.4% respectively in the reporting week, and average purchase prices for class A2, A3 and C2 went down by 1.1%, 3.0% and 0.1% respectively. Unit sales for class A3 and C2 decreased by 18.5% and 11.0% respectively. Meanwhile A2 unit sales increased by 6.6%.

National South African Price information (RMAA) : Lamb

Week 28 (07/07/2025 to 13/07/2025)	Units	Avg Purchase Price	Avg Selling Price	Week 29 (14/07/2025 to 20/07/2025)	Units	Avg Purchase Price	Avg Selling Price
Class A2	12881	106,09	106,91	Class A2	13199	105,94	107,04
Class A3	1905	104,39	105,55	Class A3	2344	103,43	105,53
Class C2	973	72,01	78,25	Class C2	1277	74,72	80,75

Lamb trade volumes recorded improved performance across various classes, indicating stronger market activity and demand. Units sales of class A2, A3 and C2 lamb increased by 2.5, 23.0% and 31.2% respectively. The weekly average purchase price for lamb class A2 and A3 dropped by 0.1% and 0.9% respectively , meanwhile C2 increased by 3.8% week-on-week. Weekly average selling prices for lamb class A2 and C2 increased by 0.1%, and 3.2% respectively, meanwhile lamb class A3 declined by insignificant 0.02%. Local lamb price fluctuations could be further driven by constrained supply across the broader meat complex at the back of recent Foot and Mouth disease outbreak.

National South African Price information (RMAA) : Pork

Week 28 (07/07/2025 to 13/07/2025)	Units	Avg Purchase Price	Week 29 (14/07/2025 to 20/07/2025)	Units	Avg Purchase Price
Class BP	13334	33,89	Class BP	13431	34,11
Class HO	4489	33,02	Class HO	4579	32,72
Class HP	5033	32,67	Class HP	5264	32,9

Pork market activity reflected mixed trends across different classes. Units sales of class BP, HO and HP pork increased by 0.7%, 2.0% and 4.6%, respectively during the reporting week in comparison to the previous week. The weekly average purchase price for class BP and class HP pork went up by 0.6% and 0.7% respectively meanwhile Class HO went down 0.9%, in the reporting week compared to the previous week.

Latest News Developments

South Africa's consumer price index (CPI) rose to 3.0% year-on-year in June, up slightly from 2.8% in May. While the increase remains at the lower end of the South African Reserve Bank's (SARB) 3%–6% target range, it highlights growing pressure from rising food prices, particularly meat oils and fats and vegetables. The recent increase in meat price inflation in South Africa was driven by two key factors, both of which are now showing signs of easing. First, the outbreak of avian influenza in Brazil led to temporary restrictions on poultry imports from Brazil, South Africa's primary supplier ,which triggered market panic and supply concerns. These restrictions have since been lifted, and poultry imports are expected to normalize in the coming months. Additionally, the Minister of Agriculture has announced the launch of South Africa's first nationwide poultry vaccination campaign to combat avian influenza and safeguard the local industry. Second, a domestic outbreak of foot-and-mouth disease (FMD) raised concerns over red meat supply, prompting panic buying and a temporary price spike. With slaughtering having resumed at major feedlots, red meat prices are beginning to ease and this trend is expected to reflect in upcoming inflation data. Furthermore, during disease outbreaks, South African meat exports are often restricted, which increases domestic supply over time and helps stabilize local prices. The Department of Agriculture has also officially launched a national FMD vaccination campaign to contain the disease and support the livestock sector. Wandile Sihlobo, Chief Economist at the Agricultural Business Chamber (Agbiz), noted that movements in South Africa's oils and fats market have largely mirrored global trends. "The FAO's Vegetable Oil Price Index has remained elevated recently, driven primarily by strong global demand for palm oil,". Looking ahead, Sihlobo added that South Africa's solid sunflower seed harvest is expected to support domestic supply and help ease any potential concerns in the local market over the coming months. However it is expected that food price inflation to moderate in the coming months, as the benefits of ample domestic grains and an expected decent fruit harvest continue to enter the market.

South Africa is poised for a relatively good winter crop season, primarily supported by promising developments in the Western Cape. Although the season is still in its early stages, initial signs are encouraging. At the onset of the 2025–26 winter crop cycle, there was considerable uncertainty regarding weather conditions, compounded by elevated input costs that placed additional pressure on farmers. However, the weather has turned out more favourable than expected, with widespread rainfall across most farming regions of the Western Cape. This province, which contributes over two-thirds of South Africa's winter crop output, has benefited significantly from recent rains. These favourable conditions have improved crop growth prospects and sparked optimism for a strong harvest in the months ahead. Additional, in other winter crop-producing regions of South Africa, the extended summer rainfall period has significantly improved soil moisture and boosted dam levels, factors that are particularly beneficial for winter crops, especially in irrigated areas. Current water availability is adequate to support crop development throughout the season. Although input costs were relatively high at the start of the planting period, farmers remained optimistic and committed to maintaining their intended planting areas.

South Africa has successfully exported 326 in vivo cattle embryos to Paraguay, marking a significant milestone in re-establishing the country's presence in the global livestock genetics market. This is the first export of its kind since the 2021 outbreak of foot-and-mouth disease (FMD), which led to the suspension of all international trade in South African livestock genetic material. This achievement is the result of months of coordinated efforts between the National Genetic Export Advisory Committee (NGEAC), the Directorate of Animal Health within the Department of Agriculture and a subcommittee of the Red Meat Producers' Organisation (RPO). The successful shipment reflects growing confidence in South Africa's biosecurity protocols and the renewed credibility of its genetic export systems. Paraguay's National Service for Animal Quality and Health worked with South African officials to finalise the necessary animal health certificates. According to Van Rooyen (NGEAC) chairperson, cattle producers in Paraguay believed the Bonsmara, in particular, was the ideal breed with which to improve the production potential of their own cattle.

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