MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA APRIL 2024

Issued: 7 May 2024

Directorate: Statistics and Economic Analysis

- **During April 2024, significant rainfall events were distributed across most parts of the country except for the Northern Cape Province.**
- **The final production estimate of wheat for 2023 is 2,078 million tons, which is 1,5% less than the previous seasons' crop of 2,110 million tons.**
- **The projected closing stocks of wheat for the current 2023/24 marketing year are 523 484 tons, which includes imports of 1,650 million tons. It is also 7,1% less than the previous years' ending stocks.**
- **Early indications are that producers intend to plant 520 200 ha of wheat for the 2024 production season, which is 3,3% less than the 537 950 ha planted to wheat in 2023.**
- **The expected commercial maize crop for 2024 is 13,392 million tons, which is 18,5% less than the 16 430 000 tons of the previous season (2023).**
- **Projected closing stocks of maize for the past 2023/24 marketing year are 2,423 million tons, which is 24,0% more than the previous years' ending stocks.**
- **Projected closing stocks of maize for the current 2024/25 marketing year are 1,668 million tons, which is 31,2% less than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the current 2024/25 marketing year are 22 913 tons, which is 58,2% less than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2024/25 marketing year are 76 544 tons, which is 39,8% less than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the current 2024/25 marketing year are 225 277 tons, which is 29,7% less than the previous years' ending stocks.**
- **The annual percentage change in the CPI was lower at 5,3% in March 2024.**
- **The annual percentage change in the PPI for final manufactured goods was higher at 4,6% in March 2024.**
- **March 2024 tractor sales of 498 units were significantly less (26%) than the 676 units sold in March 2023.**

agriculture, land reform & rural development

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1. Weather conditions

1.1 Rainfall for April 2024

During April 2024, significant rainfall events were distributed across most parts of the country except for the Northern Cape Province (**Figure 1**). Comparing rainfall totals to the long-term average for April 2024, the central parts of the country, including Gauteng and Mpumalanga as well as the Eastern Cape and Western Cape provinces received above-normal rainfall. The remainder of the country received near-normal rainfall. However, below-normal rainfall was evident over large parts of the Northern Cape Province (**Figure 2**). (Source: Directorate: Climate Change and Disaster Management of Department: Agriculture, Land Reform and Rural Development).

Figure 1: Rainfall (mm) for April 2024

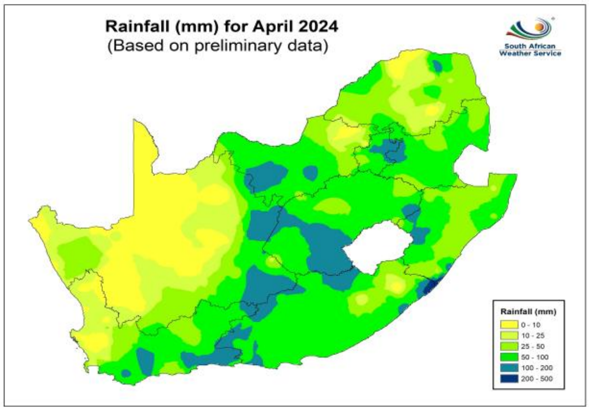
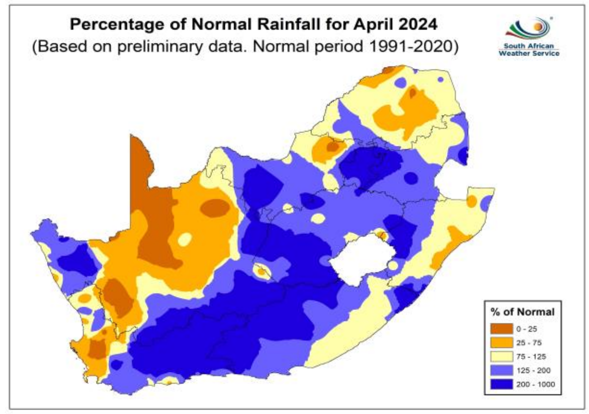


Figure 2: Percentage rainfall for April 2024



1.2 Level of dams

Available information on the level of South Africa's dams on 29 April 2024 indicates that the country has approximately 87% of its full supply capacity (FSC) available, which is 6,0% less as compared to the corresponding period in 2023. The dam levels in the Western Cape (8%), Eastern Cape (8%) and KwaZulu-Natal (1%) provinces, all show improvements in the full supply capacity as compared to 2023. However, the Free State (-12%), North West (-11%), Gauteng (-9%), Limpopo (-4%) and Northern Cape (-2%) provinces, all show decreases in full supply capacity as compared to 2023. With reference to Mpumalanga, the full supply capacity remained unchanged as compared to 2023. The provincial distribution of South Africa's water supply including Lesotho and Swaziland is contained in **Table 1** below.

Table 1: Level of dams, 29 April 2024

Province	Net FSC million cubic meters	**29/04/2024 (%)**	Last Year (2023) (%)	% Increase/Decrease 2024 vs. 2023
Eastern Cape	1 729	85	77	8,0
Free State	15 657	87	99	-12,0
Gauteng	128	90	99	-9,0
Kingdom of Lesotho*	2 363	97	100	-3,0
Kingdom of Eswatini*	334	100	100	-
KwaZulu-Natal	4 910	92	91	1,0
Limpopo	1 480	85	89	-4,0
Mpumalanga	2 539	98	98	-
North West	867	76	87	-11,0
Northern Cape	146	84	86	-2,0
Western Cape	1 868	60	52	8,0
Total	**32 021**	**87**	**93**	**-6,0**

Source: Department of Water and Sanitation

2. Grain production

2.1 Summer grain crops - 2024

The area planted and third production forecast for summer grains for the 2024 season was released by the Crop Estimates Committee (CEC) on 25 April 2024, and is as follows:

Table 2: Commercial summer grains: Area planted and third production forecast - 2024 season

CROP	**Area planted 2024 Ha (A)**	**3rd forecast 2024 Tons (B)**	Area planted 2023 Ha (C)	Final estimate 2023 Tons (D)	Change 2024 vs 2023 % (B) ÷ (D)
Commercial:					
White maize	**1 554 750**	**6 406 950**	1 521 300	8 505 000	-24,67
Yellow maize	**1 081 500**	**6 984 750**	1 064 800	7 925 000	-11,86
Total Maize	**2 636 250**	**13 391 700**	2 586 100	16 430 000	-18,49
Sunflower seed	**529 000**	**615 000**	555 700	720 000	-14,58
Soybeans	**1 150 500**	**1 813 790**	1 148 300	2 770 000	-34,52
Groundnuts	**41 200**	**54 960**	31 300	53 000	3,70
Sorghum	**42 100**	**94 105**	34 000	94 360	-0,
Dry beans	**39 550**	**54 120**	36 650	50 260	7,68
TOTAL	**4 438 600**	**16 023 675**	4 392 050	20 117 620	-20,35

Note: Estimate is for calendar year, e.g. production season 2023/24 = 2024

- The revised area estimate for maize is 2 636 250 ha, which is 1,94% or 50 150 ha more than the 2 586 100 ha planted for the previous season, and 0,11% or 3 000 ha less than the area estimate of 2 639 250 ha released in February 2024.
- The expected **commercial maize crop** is 13 391 700 tons, which is 18,49% or 3,038 million tons less than the 16 430 000 tons of the previous season (2023). The yield for maize is 5,08 t/ha.
- The area estimate for **white maize** is 1 554 750 ha, which represents an increase of 2,20% or 33 450 ha compared to the 1 521 300 ha planted last season. The production forecast of white maize is 6 406 950 tons, which is 24,67% or 2,098 million tons less than the 8 505 000 tons of last season. The yield for white maize is 4,12 t/ha.
- In the case of **yellow maize,** the area estimate is 1 081 500 ha, which is 1,57% or 16 700 ha more than the 1 064 800 ha planted last season. The yellow maize production forecast is 6 984 750 tons, which is 11,86% or 940 250 tons less than the 7 925 000 tons of last season. The yield for yellow maize is 6,46 t/ha.
- The revised area estimate for sunflower seed is 529 000 ha, which is 4,80% or 26 700 ha less than the 555 700 ha planted the previous season. The production forecast for **sunflower seed** is 615 000 tons, which is 14,58% or 105 000 tons less than the 720 000 tons of the previous season. The expected yield is 1,16 t/ha.
- It is estimated that 1 150 500 ha have been planted to **soybeans**, which represents a decrease of 0,19% or 2 200 ha compared to the 1 148 300 ha planted last season. The production forecast is 1 813 790 tons, which is 34,52% or 956 210 tons less than the 2 770 000 tons of the previous season. The expected yield is 1,58 t/ha.
- For **groundnuts**, the area estimate is 41 200 ha, which is 31,63% or 9 900 ha more than the 31 300 ha planted for the previous season. The expected crop is 54 960 tons – which is 3,70% or 1 960 tons more than the 53 000 tons of last season. The expected yield is 1,33 t/ha.
- The area estimate for **sorghum** increased by 23,82% or 8 100 ha, from 34 000 ha to 42 100 ha against the previous season. The production forecast for sorghum is 94 105 tons, which is 0,27% or 255 tons less than the 94 360 tons of the previous season. The expected yield is 2,24 t/ha.

- For **dry beans**, the area estimate is 39 550 ha, which is 7,91% or 2 900 ha more the 36 650 ha planted for the previous season. The production forecast is 54 120 tons, which is 7,68% or 3 860 tons more than the 50 260 tons of the previous season. The expected yield is 1,37 t/ha.

Please note that the fourth production forecast for summer field crops for 2024 will be released on 28 May 2024.

2.2 Winter cereal crops – 2024

The intentions to plant winter cereals for the 2024 season was also released by CEC on 25 April 2024, and is as follows:

Table 3: Commercial winter cereals: Intentions to plant - 2024 season

CROP	Intentions* 2024 Ha (A)	Area planted 2023 Ha (B)	Final estimate 2023 Tons (C)	Change % (A) ÷ (B)
Wheat	**520 200**	537 950	2 078 025	-3,30%
Malting barley*	**102 000**	107 600	376 195	-5,20%
Canola	**141 100**	131 200	237 450	7,55%
Cereal oats*	**20 500**	27 500	40 250	-25,45%
Sweet lupines	**15 000**	16 000	16 000	-6,25%
Total winter cereals	**798 800**	820 250	2 747 920	-2,62%

* Based on conditions at the middle of April 2024

- Early indications are that producers intend to plant 520 200 ha of **wheat** for the 2024 production season. This is 3,30% or 17 750 ha less than the 537 950 ha planted to wheat in 2023.
- The main producing areas are within the Western Cape with 370 000 ha (71%), followed by the Free State with 55 000 ha (11%) and the Northern Cape with 40 000 ha (8%).
- The expected area planted to **malting barley** is 102 000 ha, which is 5,20% or 5 600 ha less than the 107 600 ha of the previous year. The expected area planted to **canola** is also 141 100 ha, which is 7,55% or 9 900 ha more than the 131 200 ha planted in 2023. Producers intend to plant 20 500 ha of **cereal oats**, which is 25,45% or 7 000 ha less than the 27 500 ha of the previous season. The expected area planted to **sweet lupines** is 15 000 ha, which is 6,25% or 1 000 ha less than the previous season.

Please note that the preliminary area estimate of winter crops for 2024 will be released on 26 July 2024.

2.3 Non-commercial maize - 2024

The CEC also released the preliminary area planted and production estimate of the non-commercial maize sector for the 2024 season on 25 April 2024.

Table 4: Non-commercial maize: Preliminary area planted and production estimate - 2024 season

CROP	**Area planted 2024 Ha (A)**	**Production 2024 Tons (B)**	Area planted 2023 Ha (C)	Final crop 2023 Tons (D)	Change % (B) ÷ (D)
Non-commercial agriculture:					
White maize	**267 570**	**407 500**	278 655	472 765	-13,80
Yellow maize	**79 430**	**167 500**	79 965	191 275	-12,43
Maize	**347 000**	**575 000**	358 620	664 040	-13,41

The area planted to maize in the non-commercial agricultural sector is estimated at 347 000 ha, which represents a decrease of 3,24%, compared to the 358 620 ha of the previous season. The expected maize crop for this sector is

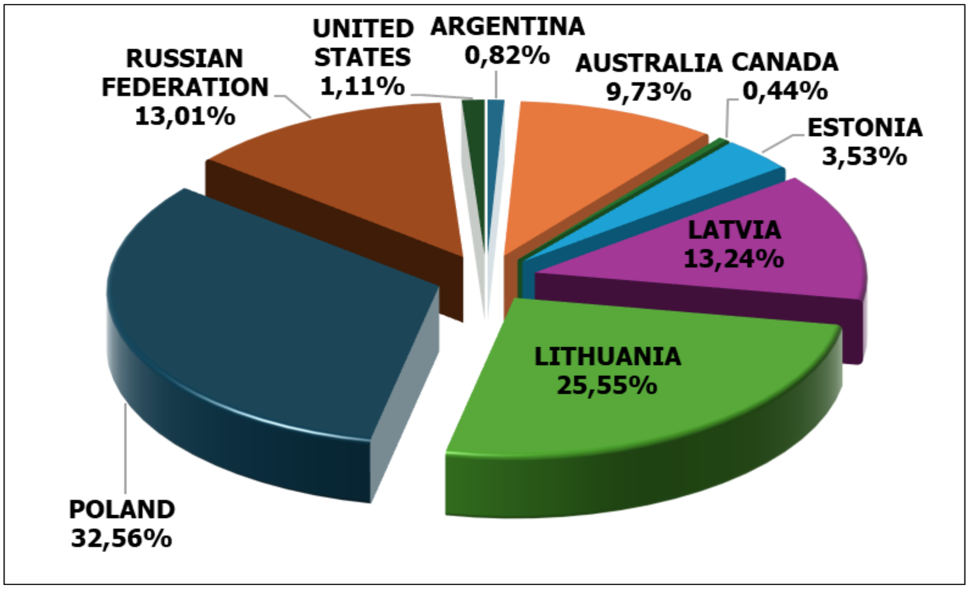
575 000 tons, which is 13,41% less than the 664 040 tons of last season. It is important to note that about 46% of the maize produced in the non-commercial sector, is planted in the Eastern Cape, followed by KwaZulu-Natal with 22%.

3. Cereal balance sheets

For the latest Cereal Balance Sheets (supply and demand tables) on maize, wheat, sorghum, sunflower seed and soybeans please refer to the attachment called FSB APR24 Annexure A.

3.1 Imports and exports of wheat for the 2023/24 marketing year

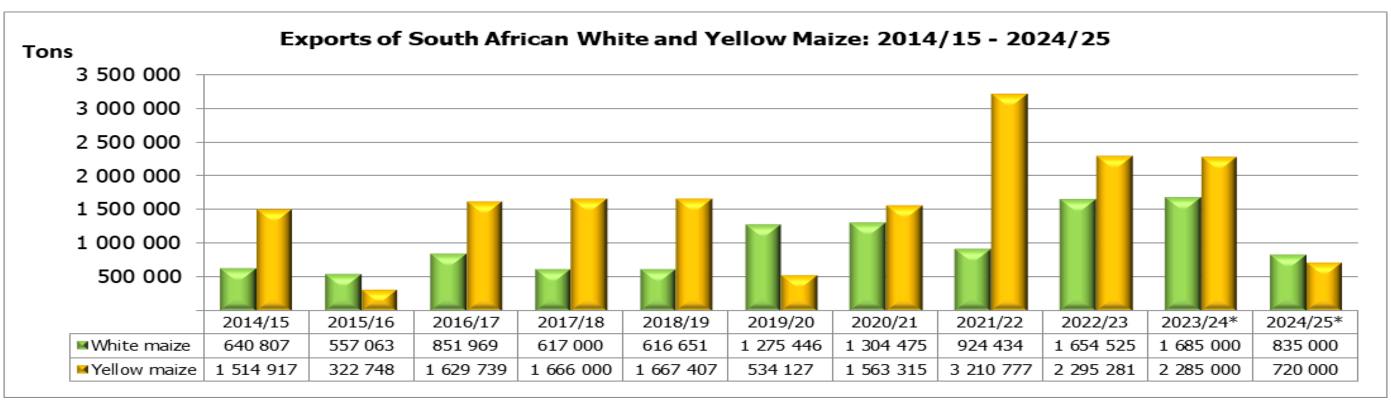
Graph 1: Major countries of wheat imports to South Africa: 2023/24 marketing year



- The progressive wheat imports (human consumption) for the 2023/24 marketing year (30 September 2023 to 26 April 2024) amount to 974 530 tons, with 32,56% or 317 289 tons from Poland, followed by 25,55% or 248 986 tons from Lithuania, 13,24% or 129 053 tons from Latvia, 13,01% or 126 762 tons from the Russian Federation, 9,73% or 94 861 tons from Australia, 3,53% or 34 410 tons from Estonia, 1,11% or 10 865 tons from the United States, 0,82% or 8 004 tons from Argentina and 0,44% or 4 300 tons from Canada. The exports of wheat (human consumption) for the above-mentioned period amount to 111 112 tons, of which 31,48% or 34 979 tons went to Zimbabwe, 28,72% or 31 913 tons went to Lesotho, 27,20% or 30 219 tons went to Botswana, 7,62% or 8 463 tons went to Zambia and only 4,98% or 5 538 tons went to Namibia.

3.2 Exports of South African white and yellow maize

Graph 2: Exports of South African white and yellow maize: 2014/15 - 2024/25 marketing year



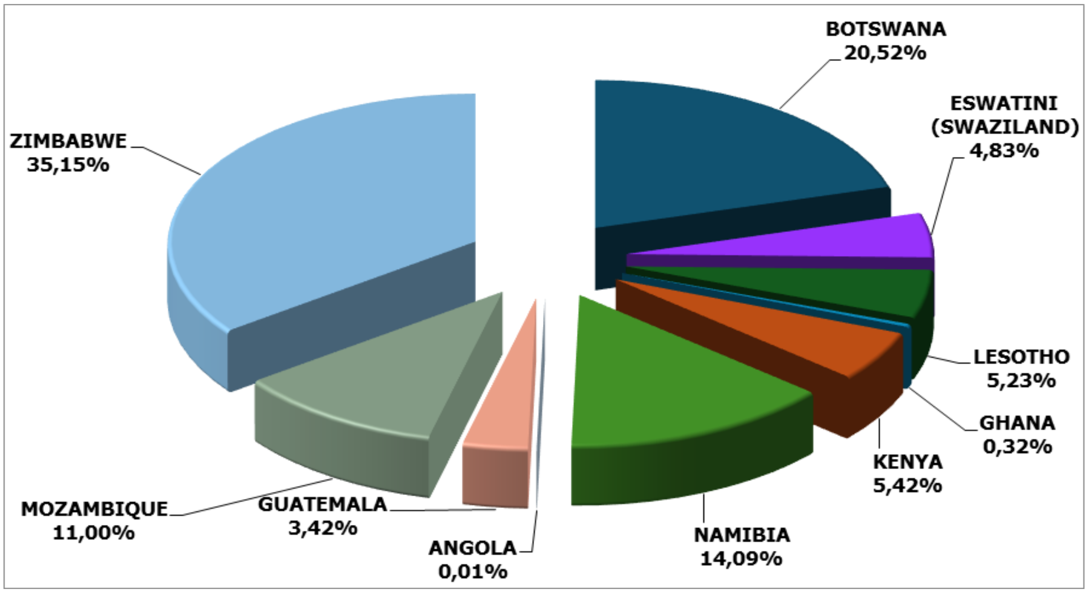
	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24*	2024/25*
White maize	640 807	557 063	851 969	617 000	616 651	1 275 446	1 304 475	924 434	1 654 525	1 685 000	835 000
Yellow maize	1 514 917	322 748	1 629 739	1 666 000	1 667 407	534 127	1 563 315	3 210 777	2 295 281	2 285 000	720 000

*Projection

- The exports of white maize for the 2023/24 marketing year are projected at 1,685 million tons, which represents an increase of 1,84% or 30 475 tons compared to the 1,654 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 2,285 million tons, which represents a decrease of 0,45% or 10 281 tons compared to the 2,295 million tons of the previous marketing year.

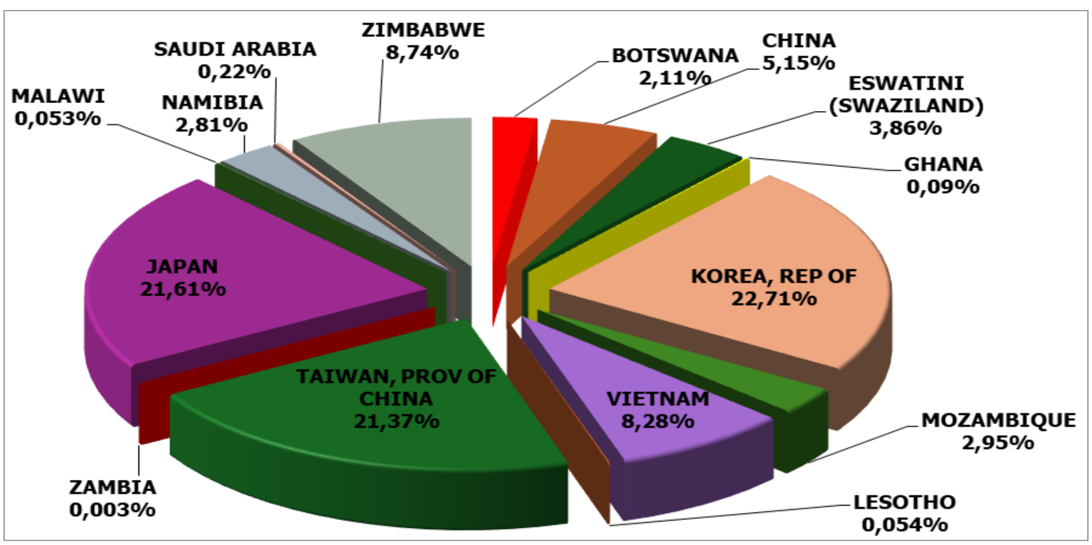
- The exports of white maize for the 2024/25 marketing year are projected at 835 000 tons, which represents a decrease of 50,45% or 850 000 tons compared to the 1,685 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 720 000 tons, which represents a decrease of 68,49% or 1,565 million tons compared to the 2,285 million tons of the previous marketing year.

Graph 3: Major countries of white maize exports from South Africa: 2023/24 marketing year



- From 29 April 2023 to 26 April 2024, progressive white maize exports for the 2023/24 marketing year amount to 1,250 million tons, with the main destinations being Zimbabwe (35,15% or 439 330 tons), followed by Botswana (20,52% or 256 439 tons), Namibia (14,09% or 176 127 tons), Mozambique (11,00% or 137 456 tons), Kenya (5,42% or 67 792 tons), Lesotho (5,23% or 65 315 tons), Eswathini (Swaziland) (4,83% or 60 394 tons), Guatemala (3,42% or 42 770 tons), Ghana (0,32% or 4 018 tons) and Angola (0,01% or 105 tons). The imports of white maize for the mentioned period amount to zero.

Graph 4: Major countries of yellow maize exports from South Africa: 2023/24 marketing year



- From 29 April 2023 to 26 April 2024, progressive yellow maize exports for the 2023/24 marketing year amount to 2,167 million tons, with the main destinations being Republic of Korea (22,71% or 492 252 tons), followed by Japan (21,61% or 468 303 tons), Taiwan (21,37% or 463 086 tons), Vietnam (8,28% or 179 330 tons), Zimbabwe (8,74% or 189 462 tons), China (5,15% or 111 513 tons), Eswathini (Swaziland) (3,86% or

83 625 tons), Mozambique (2,95% or 63 986 tons), Namibia (2,81% or 60 836 tons), Botswana (2,11% or 45 667 tons), Saudi Arabia (0,22% or 4 720 tons), Ghana (0,09% or 1 969 tons), Lesotho (0,054% or 1 162 tons), Malawi (0,053% or 1 145 tons) and Zambia (0,003% or 72 tons). The imports of yellow maize for the mentioned period amount to 32 691 (100%) tons from Argentina.

4. Market information

4.1 Consumer Price Index (CPI)

- Annual consumer price inflation was 5,3% in March 2024, down from 5,6% in February 2024. The consumer price index increased by 0,8% month-on-month in March 2024.
- The main contributors to the 5,3% annual inflation rate were:
  - Housing and utilities (increased by 5,9% year-on-year and contributed 1,4%);
  - Miscellaneous goods and services (increased by 8,5% year-on-year and contributed 1,2%);
  - Food and non-alcoholic beverages (increased by 5,1% year-on-year and contributed 0,9%); and
  - Transport (increased by 5,3% year-on-year and contributed 0,8%).
- In March 2024, the annual inflation rate for goods was 5,7%, down from 6,2% in February 2024; and for services it was 5,0%, up from 4,9% in February 2024.

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 4,6% in March 2024, up from 4,5% in February 2024. The producer price index (PPI) increased by 1,1% month-on-month in March 2024.
- The main contributors to the headline PPI annual inflation rate were:
  - Food products, beverages and tobacco products (increased by 4,4% year-on-year and contributed 1,3%);
  - Coke, petroleum, chemical, rubber and plastic products (increased by 4,6% year-on-year and contributed 1,1%); and
  - Metals, machinery, equipment and computing equipment (increased by 5,5% year-on-year and contributed 0,8%).
- The main contributors to the headline PPI monthly increase were coke, petroleum, chemical, rubber and plastic products (increased by 2,5% month-on-month and contributed 0,6%) and food products, beverages, and tobacco products (increased by 1,2% month-on-month and contributed 0,3%).
- The annual percentage change in the PPI for intermediate manufactured goods was 1,7% in March 2024 (compared with 1,0% in February 2024). The index increased by 1,1% month-on-month. The main contributors to the annual rate were basic and fabricated metals (0,8%) and chemicals, rubber and plastic products (0,4%). The main contributor to the monthly rate was basic and fabricated metals (0,6%).
- The annual percentage change in the PPI for electricity and water was 15,6% in March 2024 (compared with 16,0% in February 2024). The index decreased by 1,6% month-on-month. Electricity contributed 14,0% and water contributed 1,5% to the annual rate. Electricity contributed -1,5% to the monthly rate.
- The annual percentage change in the PPI for mining was -12,7% in March 2024 (compared with -9,0% in February 2024). The index decreased by 1,9% month-on-month. The main negative contributors to the annual rate were non-ferrous metal ores (-15,6%) and coal and gas (-2,3%). The main negative contributors to the monthly rate were coal and gas (-1,4%) and stone quarrying, clay and diamonds (-1,0%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was 7,7% in March 2024 (compared with 2,8% in February 2024). The index increased by 2,4% month-on-month. The main contributor to the annual rate was agriculture (7,3%). The contributor to the monthly rate was agriculture (2,5%).

4.3 Future contract prices

Table 5: Closing prices on Friday, 3 May 2024

	3 May 2024	3 April 2024	% Change
RSA White Maize per ton (May 2024 contract)	R5 030,00	R5 160,00	-2,52
RSA Yellow Maize per ton (May 2024 contract)	R4 155,00	R4 223,00	-1,61
RSA Wheat per ton (May 2024 contract)	R6 230,00	R6 145,00	1,38
RSA Sunflower seed per ton (May 2024 contract)	R8 790,00	R9 455,00	-7,03
RSA Soya-beans per ton (May 2024 contract)	R8 620,00	R8 732,00	-1,28
Exchange rate R/$	R18,53	R18,81	-1,49

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- March 2024 tractor sales of 498 units were significantly less (26%) than the 676 units sold in March 2023. Year-to-date tractor sales are now 28% down on last year. Twenty-six combine harvesters were sold in March 2024, 13 less than the 39 units sold in March 2023. On a year-to-date basis, combine harvester sales are now almost 45% down on last year.
- With the El Niño phenomenon now expressing itself, some uncertainty has been created amongst farmers. Although summer crops in the east should provide good yields, late planted crops, particularly in the west, will not realise the yields hoped for. The Crop Estimates Committee (CEC) predictions show that there will be significant reductions in most summer crops, particularly in the Free State and North West provinces, compared to last year. The rain over the past week or so will be too late to save these late-planted crops. The CEC is predicting a maize crop for the forthcoming season almost 19% down on last year and soybeans almost 34% down.
- Expectations are that, despite the market being very competitive, 2024 calendar year tractor sales will be between 15 and 20% % down on last year.

Table 6: Agricultural machinery sales

Equipment class	Year-on-year March 2024	Year-on-year March 2023	Percentage Change %	Year-to-date March 2024	Year-to-date March 2023	Percentage Change %
Tractors	498	676	-26,33	1 383	1 927	--28,23
Combine harvesters	26	39	-33,33	52	49	-44,68

Source: SAAMA press release, April 2024

PLEASE NOTE: The Food Security Bulletin for May 2024 will be released on **5 June 2024**.

5. Acknowledgements

The Directorate: Statistics and Economic Analysis makes use of information sourced from various institutions and organisations within South Africa to compile the monthly report on South Africa's Food Security Situation. This report has been compiled with the aid of information and reports sourced from the following institutions and organisations:

- Agbiz
- Agfacts
- BVG Commodities (Pty) Limited
- Department of Water and Sanitation
- Directorate: Climate Change and Disaster Management at DAFF
- Grain South Africa (Grain SA)
- IGC Grain Market Report
- National Agricultural Marketing Council (NAMC)
- South African Agricultural Machinery Association (SAAMA)
- South African Futures Exchange (SAFEX)
- Statistics South Africa (Stats SA)
- The South African Supply and Demand Estimates Report (SASDE)
- The South African Grain Information Service (SAGIS)
- The South African Weather Service (WeatherSA)
- USDA Foreign Service