MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA DECEMBER 2024

Issued: 15 January 2025

Directorate: Statistics and Economic Analysis

- **According to the latest report of the Climate Prediction Centre, La Niña conditions are present.**
- **The expected commercial wheat crop for 2024 is 1,935 million tons, which is 5,6% less than the 2,050 million tons of the previous season (2023).**
- **The projected closing stocks of wheat for the current 2024/25 marketing year are 683 228 tons, which includes imports of 1,82 million tons. It is also 8,9% less than the previous years' ending stocks**
- **Projected closing stocks of maize for the current 2024/25 marketing year are 685 232 tons, which is 71,5% less than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the current 2024/25 marketing year are 70 985 tons, which is 29,6% more than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2024/25 marketing year are 43 474 tons, which is 65,8% less than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the current 2024/25 marketing year are 128 307 tons, which is 60,0% less than the previous years' ending stocks.**
- **The annual percentage change in the CPI was higher at 2,9% in November 2024.**
- **The annual percentage change in the PPI for final manufactured goods was higher at -0,1% in November 2024.**
- **November 2024 tractor sales of 523 units were approximately 24% less than the 685 units sold in November 2023.**

agriculture, land reform & rural development

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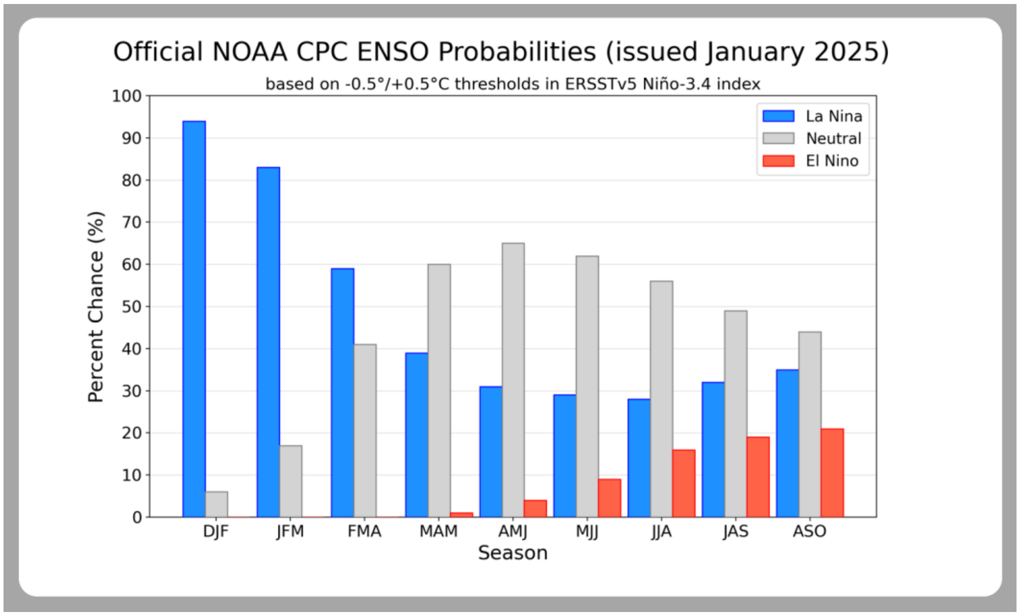
1. Weather conditions

1.1 El Niño/Southern Oscillation (enso) diagnostic discussion

According to the latest report (9 January 2025) of the Climate Prediction Centre, La Niña conditions are present. Equatorial sea surface temperatures (SSTs) are below-average in the central and east-central Pacific Ocean. La Niña conditions are expected to persist through February to April 2025 (59% chance), with a transition to ENSO-neutral likely during March to May 2025 (60% chance). (**Figure 1**). (Source: Climate Prediction Centre, NOAA).

Figure 1: Official ENSO probabilities for the Niño 3.4 sea surface temperature index



1.2 Level of dams

Available information on the level of South Africa's dams on 13 January 2025 indicates that the country has approximately 80% of its full supply capacity (FSC) available, which is 12,0% less as compared to the corresponding period in 2024. The dam levels in mosl provinces show decreases in the full supply capacity as compared to 2023. The Free State (-23%), Northern Cape (-20%), Gauteng (-7%), North West (-5%), Eastern Cape (-5%), Mpumalanga (-4%), and Limpopo (-1%) provinces, all show decreases in full supply capacity as compared to 2024. However, the Western Cape (3%) and KwaZulu-Natal (4%) provinces show an improvement in full supply capacity as compared to 2024. The provincial distribution of South Africa's water supply including Lesotho and Swaziland is contained in **Table 1** below. (*Source: Department of Water and Sanitation)*

Table 1: Level of dams, 13 January 2025

Province	Net FSC million cubic meters	13/01/2025 (%)	Last Year (2024) (%)	% Increase/Decrease 2025 vs. 2024
Eastern Cape	1 728	**81**	86	-5,0
Free State	15 657	**73**	96	-23,0
Gauteng	128	**86**	93	-7,0
Kingdom of Lesotho*	2 363	**86**	99	-13,0
Kingdom of Eswatini*	334	**101**	100	1,0
KwaZulu-Natal	4 910	**91**	87	4,0
Limpopo	1 485	**83**	84	-1,0
Mpumalanga	2 538	**93**	97	-4,0
North West	867	**72**	77	-5,0
Northern Cape	147	**68**	88	-20,0
Western Cape	1 918	**81**	79	2,0
Total	32 075	**80**	92	**-12,0**

2. Grain production

2.1 Summer grain crops - 2025

Please note that the preliminary area planted estimate for summer field crops for 2025 will be released on 28 January 2025.

2.2 Winter cereal crops – 2024

The CEC also released the area planted and fifth production forecast of the winter cereals for the 2024 season on 19 December 2024.

Table 2: Winter cereals: Area planted and fifth production forecast – 2024 season

CROP	Area planted 2024 Ha (A)	5th Forecast 2024 Tons (B)	Area planted 2023 Ha (C)	Final crop 2023 Tons (D)	Change % (B) ÷ (D)
Commercial:					
Wheat	**505 300**	**1 934 990**	537 950	2 050 000	-5,61%
Barley	**100 700**	**377 050**	107 600	377 000	0,01%
Canola	**165 750**	**295 445**	131 200	236 300	25,03%
Oats	**31 000**	**50 300**	27 500	41 000	22,68%
Sweet lupines	**16 000**	**19 200**	16 000	16 000	20,00%
Total winter	**818 750**	**2 676 985**	820 250	2 720 300	-1,59%

Commercial only. Excluding barley or oats used as pasture, silage, hay and/or on the farm as fodder for livestock

- The expected production of **wheat** is 1,935 million tons, which is 5,61 % or 115 010 tons less than the previous seasons' crop of 2,050 mill. tons, whilst the expected yield is 3,83 t/ha.
- The production forecast for **barley** is 377 050 tons, which is 0,01% or 50 tons more than the previous seasons' crop of 377 000 tons. The area planted is estimated at 100 700 ha, while the expected yield is 3,74 t/ha.
- The expected **canola crop** is 295 445 tons, which is 25,03% or 59 145 tons more than the previous seasons' crop of 236 300 tons. The area estimate for canola is 165 750 ha, with an expected yield of 1,78 t/ha.
- The expected crop for **oats** for the 2024 season is 50 300 tons and the area planted is 31 000 ha. The expected yield is 1,62 t/ha.
- In the case of **sweet lupines,** the production forecast is 19 200 tons. The area estimate of sweet lupines is 16 000 ha, with an expected yield of 1,20 t/ha.

Please note that the sixth production forecast of winter crops for 2024 will be released on 28 January 2025.

2.3 Non-commercial maize - 2024

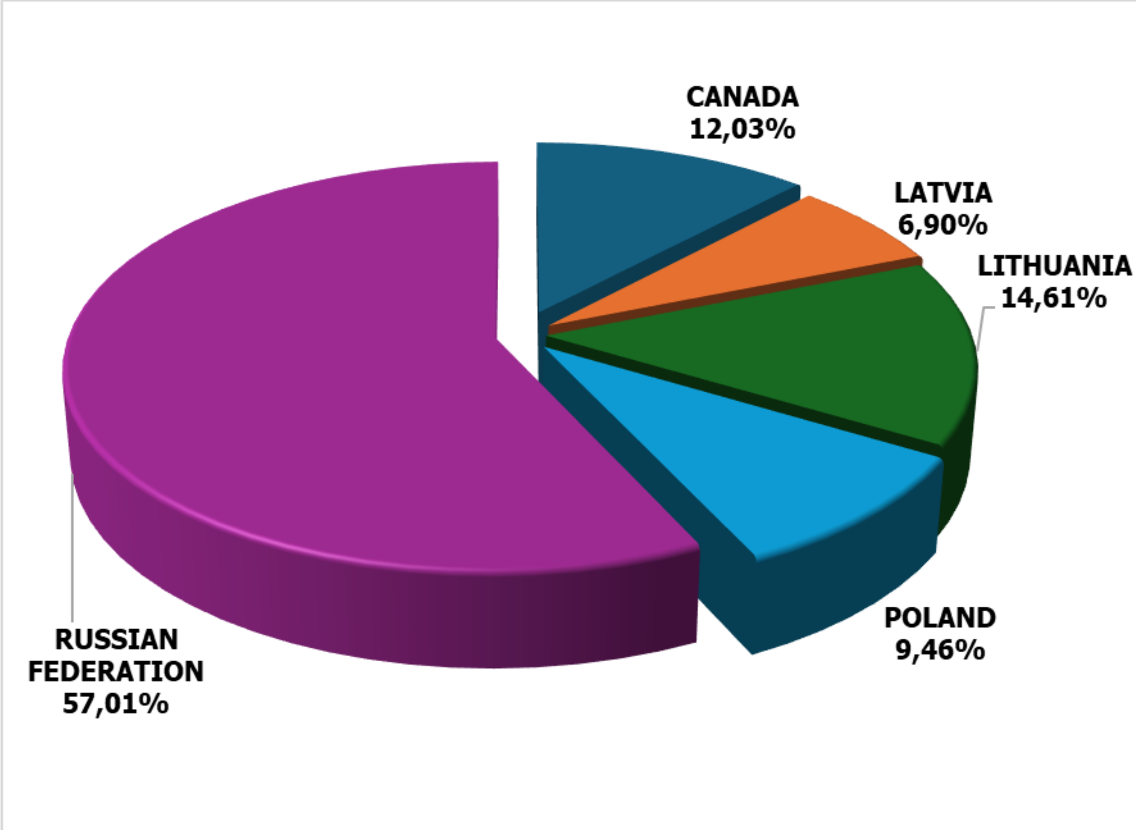
Please note that the area planted and production estimate of the non-commercial maize sector for the 2025 season will be released on 30 April 2025.

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 DEC24 Annexure A.

3.1 Imports and exports of wheat for the 2024/25 marketing year

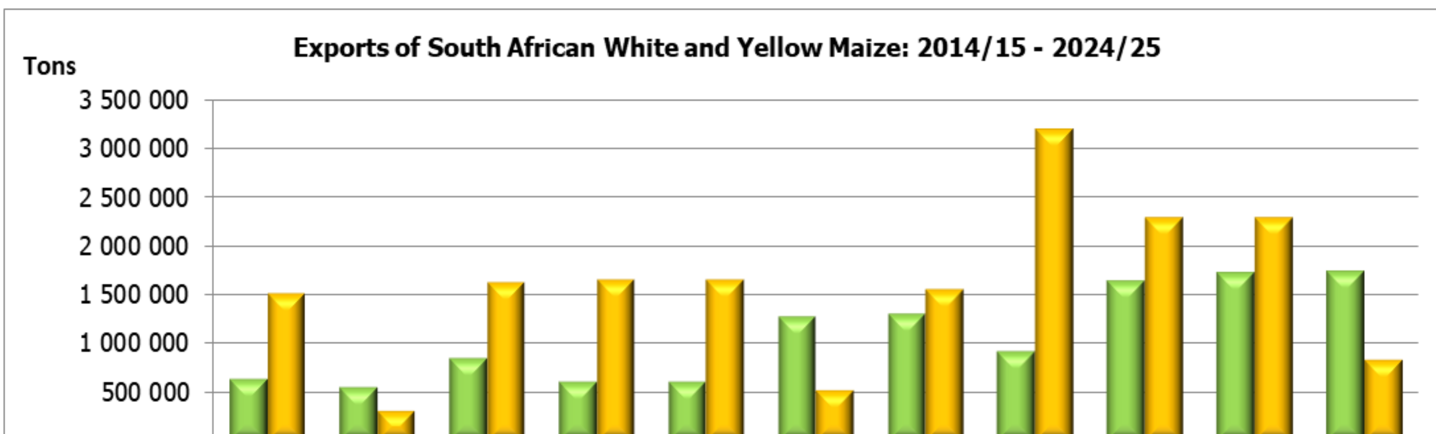
Graph 1: Major countries of wheat imports to South Africa: 2024/25 marketing year



The progressive wheat imports (human consumption) for the 2024/25 marketing year (28 September 2024 to 3 January 2025) amount to 449 921 tons, with 57,01% or 256 507 tons from Russian Federation, followed by 14,61% or 65 716 tons from Lithuania, 12,03% or 54 105 tons from Canada, 9,46% or 42 568 tons from Poland and only 6,90% or 31 025 tons from Latvia. The exports of wheat (human consumption) for the above-mentioned period amount to 20 782 tons, of which 41,34% or 8 591 tons went to Zimbabwe, 27,87% or 5 791 tons went to Lesotho, 12,04% or 2 503 tons went to Botswana, 11,35% or 2 359 tons went to Namibia and 7,40% or 1 538 tons went to Zambia.

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

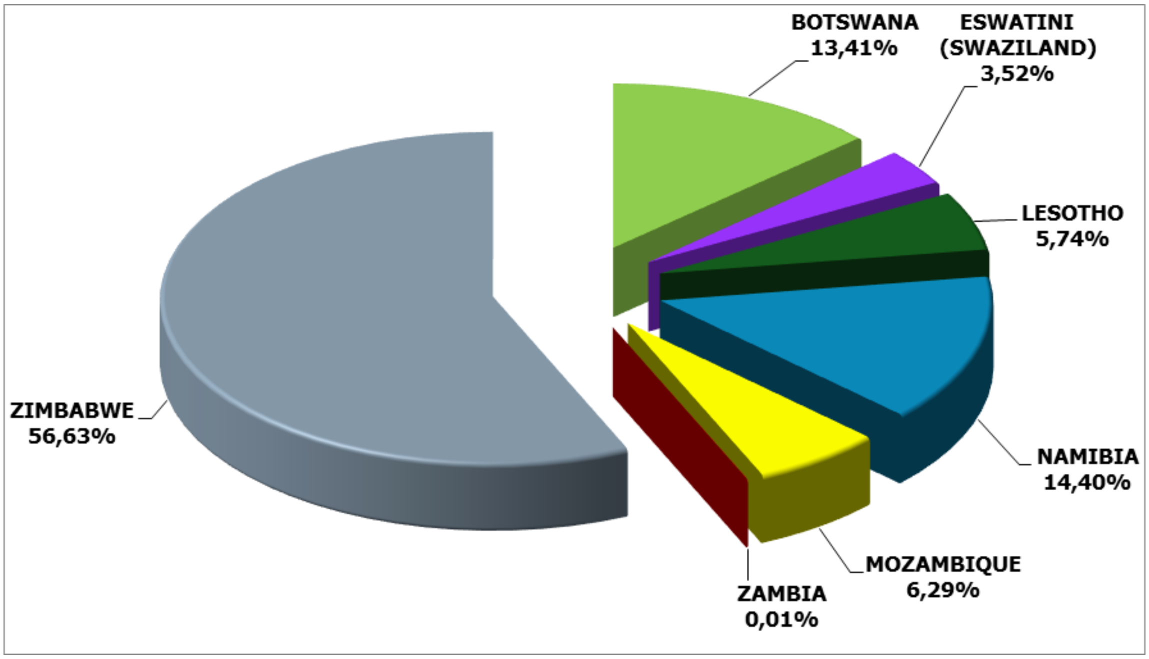


	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25*
White maize	640 807	557 063	851 969	617 000	616 651	1 275 446	1 304 475	924 434	1 654 525	1 734 933	1 740 000
Yellow maize	1 514 917	322 748	1 629 739	1 666 000	1 667 407	534 127	1 563 315	3 210 777	2 295 281	2 296 110	840 000

*Projection

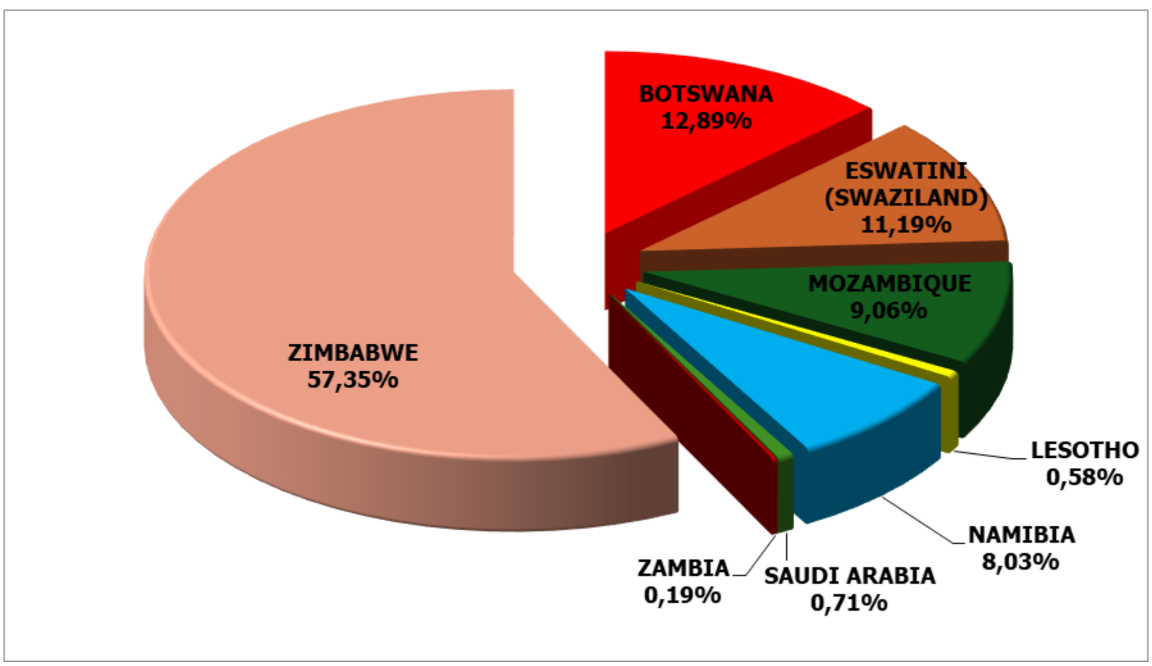
- The exports of white maize for the 2024/25 marketing year are projected at 1,740 million tons, which represents an increase of 0,29% or 5 067 tons compared to the 1,735 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 840 000 tons, which represents a decrease of 63,42% or 1,456 million tons compared to the 2,296 million tons of the previous marketing year.

Graph 3: Major countries of white maize exports from South Africa: 2024/25 marketing year



- From 27 April 2024 to 3 January 2025, progressive white maize exports for the 2024/25 marketing year amount to 1,031 million tons, with the main destinations being Zimbabwe (56,63% or 583 593 tons), followed by Namibia (14,40% or 148 356 tons), Botswana (13,41% or 138 143 tons), Mozambique (6,29% or 64 824 tons), Lesotho (5,74% or 59 174 tons), Eswathini (Swaziland) (3,52% or 36 279 tons) and Zambia (0,01% or 137 tons). The first white maize vessel, the M/V African Baza, containing 23 700 tons US white maize, is currently offloading in the Port of Durban (according to South African Grain Information Services (SAGIS) published on Friday, 10 January 2025).

Graph 4: Major countries of yellow maize exports from South Africa: 2024/25 marketing year



- From 27 April 2024 to 3 January 2025, progressive yellow maize exports for the 2024/25 marketing year amount to 564 505 tons, with the main destinations being, Zimbabwe (57,35% or 323 725 tons), followed by Botswana (12,89% or 72 757 tons), Eswathini (Swaziland) (11,19% or 63 176 tons), Mozambique (9,06% or 51 171 tons), Namibia (8,03% or 45 322 tons), Saudi Arabia (0,71% or 4 022 tons), Lesotho (0,58% or 3 249 tons) and Zambia (0,19% or 1 083 tons). The imports of yellow maize for the mentioned period amount to 465 329, with the main origins being - 77,30% or 359 704 tons from Argentina and 22,70% or 105 625 tons from Brazil.

4. Market information

4.1 Consumer Price Index (CPI)

- Annual consumer price inflation was 2,9% in November 2024, up from 2,8% in October 2024. The CPI remained unchanged month-on-month in November 2024.
- The main positive contributors to the 2,9% annual inflation rate were:
    - Housing and utilities (4,7% and contributing 1,1%);
    - Miscellaneous goods and services (6,6% and contributing 1,0%);
    - Food and non-alcoholic beverages (2,3% and contributing 0,4%); and
    - Alcoholic beverages and tobacco (4,5% and contributing 0,3%).
- Transport was the only negative contributor (-3,3% and contributing -0,5%).
- In November 2024, the annual inflation rate of goods was 1,6%, up from 1,4% in October 2024; and services was 4,3%, down from 4,4% in October 2024.

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was -0,1% in November 2024, up from -0,7% in October 2024. The producer price index (PPI) remained unchanged month-on-month in November 2024. The main negative contributor to the headline PPI annual inflation rate was coke, petroleum, chemical, rubber and plastic products (-8,1% and contributing -2,0%).
- The annual percentage change in the PPI for electricity and water was 11,2% in November 2024, the same as in October 2024. The index remained unchanged month-on-month. Electricity contributed 10,3% and water contributed 0,9% to the annual rate.
- The annual percentage change in the PPI for mining was -0,2% in November 2024, compared with -4,8% in October 2024. The index increased by 0,2% month-on-month. The main negative contributors to the annual rate were coal and gas (-1,3%) and non-ferrous metal ores (-0,6%). The main contributor to the monthly rate was gold and other metal ores (0,8%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was 3,6% in November 2024, compared with -0,3% in October 2024. The index increased by 3,3% month-on-month. The main contributor to the annual rate was agriculture (3,2%). The main contributor to the monthly rate was agriculture (3,4%).

4.3 Future contract prices

Table 3: Closing prices on Monday, 13 January 2025

	13 January 2025	13 December 2024	% Change
RSA White Maize per ton (Jan. 2024 contract)	R6 776,00	R6 308,00	7,42
RSA Yellow Maize per ton (Jan. 2024 contract)	R5 647,00	R5 132,00	10,04
RSA Wheat per ton (Jan. 2024 contract)	R6 117,00	R5 883,00	3,98
RSA Sunflower seed per ton (Jan. 2024 contract)	R10 200,00	R10 400,00	-1,92
RSA Soya-beans per ton (Jan. 2024 contract)	R9 600,00	R9 053,00	6,04
Exchange rate R/$	R19,17	R17,93	6,92

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- November 2024 tractor sales of 523 units were approximately 24% less than the 685 units sold in November 2023. Year-to-date tractor sales are now approximately 23% down on 2023. Thirteen combine harvesters were sold in November 2024, 21 less than the 34 units sold in November 2023. On a year-to-date basis, combine harvester sales are now approximately 55% down on 2023.
- The predicted fall in agricultural machinery sales back to 'normal' levels has occurred and tractor sales of approximately 6 400 units are likely for the 2024 calendar year. Similarly, combine harvester sales of between 200 and 220 units are expected for 2024.

Table 4: Agricultural machinery sales

Equipment class	Year-on-year November 2024	Year-on-year November 2023	Percentage Change %	Year-to-date November 2024	Year-to-date November 2023	Percentage Change %
Tractors	523	685	-23,65	6 021	7 843	-23,23
Combine harvesters	13	34	-61,76	195	474	-58,86

Source: SAAMA press release, December 2024

PLEASE NOTE: The Food Security Bulletin for January 2025 will be released on **5 February 2025**.

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