MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA FEBRUARY 2025

Issued: 6 March 2025

Directorate: Statistics and Economic Analysis

- **According to the latest Seasonal Climate Watch of the South African Weather Service for the period March to July 2025, the El Niño-Southern Oscillation (ENSO) has recently crossed the La Niña threshold.**
- **The expected commercial wheat crop for 2024 is 1,925 million tons, which is 6,1% 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 673 128 tons, which includes imports of 1,82 million tons. It is also 10,2% less than the previous years' ending stocks.**
- **The expected commercial maize crop for 2025 is 13,911 million tons, which is 8,26% more than the 12,850 million tons of the previous season (2024).**
- **Projected closing stocks of maize for the current 2024/25 marketing year are 797 682 tons, which is 66,8% less than the previous years' ending stocks.**
- **Projected closing stocks of maize for the coming 2025/26 marketing year are 1,089 million tons, which is 36,6% more than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the past 2024/25 marketing year are 107 690 tons, which is 96,6% more than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the current 2025/26 marketing year are 116 565 tons, which is 8,24% more than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the past 2024/25 marketing year are 39 769 tons, which is 68,7% less than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2025/26 marketing year are 37 459 tons, which is 5,8% less than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the past 2024/25 marketing year are 148 777 tons, which is 53,6% less than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the current 2025/26 marketing year are 232 102 tons, which is 56,0% more than the previous years' ending stocks.**
- **The annual percentage change in the CPI was higher at 3,2% in January 2025.**
- **The annual percentage change in the PPI for final manufactured goods was higher at 1,1% in January 2025.**
- **January 2025 tractor sales of 457 units were almost 28% more than the 358 units sold in January 2024.**

agriculture, land reform & rural development

Department:
Agriculture, Land Reform and Rural Development
REPUBLIC OF SOUTH AFRICA

Enquiries: Marda Scheepers or Queen Makgoka

Directorate: Statistics and Economic Analysis

Tel: +27 12 319 8033/8164

Email:MardaS@dalrrd.gov.za or QueenMak@dalrrd.gov.za

Contents

1. Weather conditions

1.1 Seasonal Climate Watch

According to the latest Seasonal Climate Watch of the South African Weather Service for the period March to July 2025, the El Niño-Southern Oscillation (ENSO) has recently crossed the La Niña threshold and is predicted to remain on the boundary of this threshold for the next few months. Current predictions are still uncertain, with multiple global models predicting different direction (either strengthening the La Niña state or moving back to a Neutral state). For South Africa caution is still advised in using the ENSO in any important planning decisions as it seems to be currently very volatile and unpredictable. For South Africa time is running out as well for a potential La Niña to affect us as summer is coming to an end.

Current predictions indicate above-normal rainfall for most of the north-eastern parts of the country during autumn, however this is expected to change to only above-normal rainfall for the interior and eastern coastal areas during late autumn and eventually mostly below-normal during early winter. However, due to significant reduction in rainfall over the central and north-eastern parts of the country during late autumn and early winter climatologically, the most important forecast is for the south-western parts of the country, where below-normal rainfall is expected during these seasons.

Minimum and maximum temperatures are expected to be mostly above-normal countrywide for the forecast period. However, the southern coastal areas indicate that below-normal temperatures are more likely throughout the summer period.

1.2 Level of dams

Available information on the level of South Africa's dams on 3 March 2025 indicates that the country has approximately 87% of its full supply capacity (FSC) available, which is 1,0% less as compared to the corresponding period in 2024. The North West (27%), Limpopo (6%), Gauteng (5%), KwaZulu-Natal (3%), Western Cape (2%) and Mpumalanga (1%) provinces, all show increases in full supply capacity as compared to 2024. However, the Northern Cape (-10%) and Free State (-5,0%) provinces show a decrease in full supply capacity as compared to 2024. The Eastern Cape province remained the same in full supply capacity as compared to 2024.

The provincial distribution of South Africa's water supply including Lesotho and Eswatini is contained in **Table 1** below. (*Source: Department of Water and Sanitation)*

Table 1: Level of dams, 3 March 2025

Province	Net FSC million cubic meters	03/03/2025 (%)	Last Year (2024) (%)	% Increase/Decrease 2025 vs. 2024
Eastern Cape	1 728	**82**	82	-
Free State	15 657	**85**	90	-5,0
Gauteng	128	**96**	91	5,0
Kingdom of Lesotho	2 363	**92**	97	-5,0
Kingdom of Eswatini	334	**100**	99	1,0
KwaZulu-Natal	4 910	**93**	90	3,0
Limpopo	1 485	**91**	85	6,0
Mpumalanga	2 538	**99**	98	1,0
Northern Cape	146	**66**	76	-10,0
North West	866	**101**	74	27,0
Western Cape	1 866	**66**	64	2,0
Total	32 020	**87**	88	**-1,0**

2. Grain production

2.1 Summer grain crops - 2025

The revised area planted and first production forecast for summer grains for the 2025 season was released by the Crop Estimates Committee (CEC) on 27 February 2025, and is as follows:

Table 2: Commercial summer grains: Revised area planted and first production forecast- 2025 season

CROP	**Area planted** **2025** **Ha** **(A)**	1st Forecast 2025 Tons (B)	Area planted 2024 Ha (C)	Final estimate 2024 Tons (D)	Change 2025 vs 2024 % (B) ÷ (D)
Commercial:					
White maize	**1 599 700**	**7 395 700**	1 554 750	6 055 000	22,14%
Yellow maize	**997 000**	**6 515 450**	1 081 500	6 795 000	-4,11%
Total Maize	**2 596 700**	**13 911 150**	2 636 250	12 850 000	8,26%
Sunflower seed	**555 700**	**720 050**	529 000	632 000	13,93%
Soybeans	**1 151 000**	**2 325 225**	1 150 500	1 848 000	25,82%
Groundnuts	**48 125**	**65 359**	41 200	52 000	25,69%
Sorghum	**40 400**	**129 620**	42 100	98 000	32,27%
Dry beans	**45 420**	**75 966**	39 550	50 495	50,44%
TOTAL	**4 437 345**	**17 227 370**	4 438 600	15 530 495	10,93%

Note: Estimate is for calendar year, e.g. production season 2024/25 = 2025

- The revised area estimate for maize is 2 596 700 ha, which is 1,50% or 39 550 ha less than the 2 636 250 ha planted for the previous season.
- The expected commercial maize crop is 13 911 150 tons, which is 8,26% or 1 061 150 tons more than the 12 850 000 tons of the previous season (2024). The yield for maize is 5,36 t/ha.
- The area estimate for **white maize** is 1 599 700 ha, which represents an increase of 2,89% or 44 950 ha compared to the 1 554 750 ha planted last season. The production forecast of white maize is 7 395 700 tons, which is 22,14% or 1 340 700 tons more than the 6 055 000 tons of last season. The yield for white maize is 4,62 t/ha.
- In the case of **yellow maize,** the area estimate is 997 000 ha, which is 7,81% or 84 500 ha less than the 1 081 500 ha planted last season. The yellow maize production forecast is 6 515 450 tons, which is 4,11% or 279 550 tons less than the 6 795 000 tons of last season. The yield for yellow maize is 6,54 t/ha.
- The revised area estimate for **sunflower seed** is 555 700 ha, which is 5,05% or 26 700 ha more than the 529 000 ha planted the previous season. The production forecast for sunflower seed is 720 050 tons, which is 13,93% or 88 050 tons more than the 632 000 tons of the previous season. The expected yield is 1,30 t/ha.
- It is estimated that 1 151 000 ha have been planted to **soybeans**, which represents an increase of 0,04% or 500 ha compared to the 1 150 500 ha planted last season. The production forecast is 2 325 225 tons, which is 25,82% or 477 225 tons more than the 1 848 000 tons of the previous season. The expected yield is 2,02 t/ha.
- For **groundnuts**, the area estimate is 48 125 ha, which is 16,81% or 6 925 ha more than the 41 200 ha planted for the previous season. The expected crop is 65 359 tons – which is 25,69% or 13 359 tons more than the 52 000 tons of last season. The expected yield is 1,36 t/ha.
- The area estimate for **sorghum** decreased by 4,04% or 1 700 ha, from 42 100 ha to 40 400 ha against the previous season. The production forecast for sorghum is 129 620 tons, which is 32,27% or 31 620 tons more than the 98 000 tons of the previous season. The expected yield is 3,21 t/ha.

- For **dry beans**, the area estimate is 45 420 ha, which is 14,84% or 5 870 ha more than the 39 550 ha planted for the previous season. The production forecast is 75 966 tons, which is 50,44% or 25 471 tons more than the 50 495 tons of the previous season. The expected yield is 1,67 t/ha.

Please note that the area planted and second production forecast for summer field crops for 2025 will be released on 26 March 2025.

2.2 Winter cereal crops – 2024

The CEC also released the area planted and final production estimate of the winter cereals for the 2024 season on 27 February 2025.

Table 3: Winter cereals: Area planted and final production estimate – 2024 season

CROP	**Area planted 2024** **Ha** **(A)**	**Final estimate 2024** **Tons** **(B)**	Area planted 2023 Ha (C)	Final crop 2023 Tons (D)	Change % (B) ÷ (D)
Commercial:					
Wheat	**505 300**	**1 924 890**	537 950	2 050 000	-6,10%
Barley	**100 700**	**374 000**	107 600	377 000	-0,80%
Canola	**165 750**	**288 200**	131 200	236 300	21,96%
Oats	**31 000**	**42 800**	27 500	41 000	4,39%
Sweet lupines	**16 000**	**19 200**	16 000	16 000	20,00%
Total winter	**818 750**	**2 649 090**	820 250	2 720 300	-2,62%

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 1,925 million tons, which is 6,10 % or 125 110 tons less than the previous seasons' crop of 2,050 million. tons, whilst the expected yield is 3,81 t/ha. The area planted to wheat is 505 300 ha.
- The production forecast for **barley** is 374 000 tons, which is 0,80% or 3 000 tons less than the previous seasons' crop of 377 000 tons. The area planted is estimated at 100 700 ha, while the expected yield is 3,71 t/ha.
- The expected **canola crop** is 288 200 tons, which is 21,96% or 51 900 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 1,74 t/ha.
- The expected crop for **oats** for the 2024 season is 42 800 tons and the area planted is 31 000 ha. The expected yield is 1,38 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 intentions to plant winter cereals for 2025 will be released on 30 April 2025.

2.3 Non-commercial maize - 2024

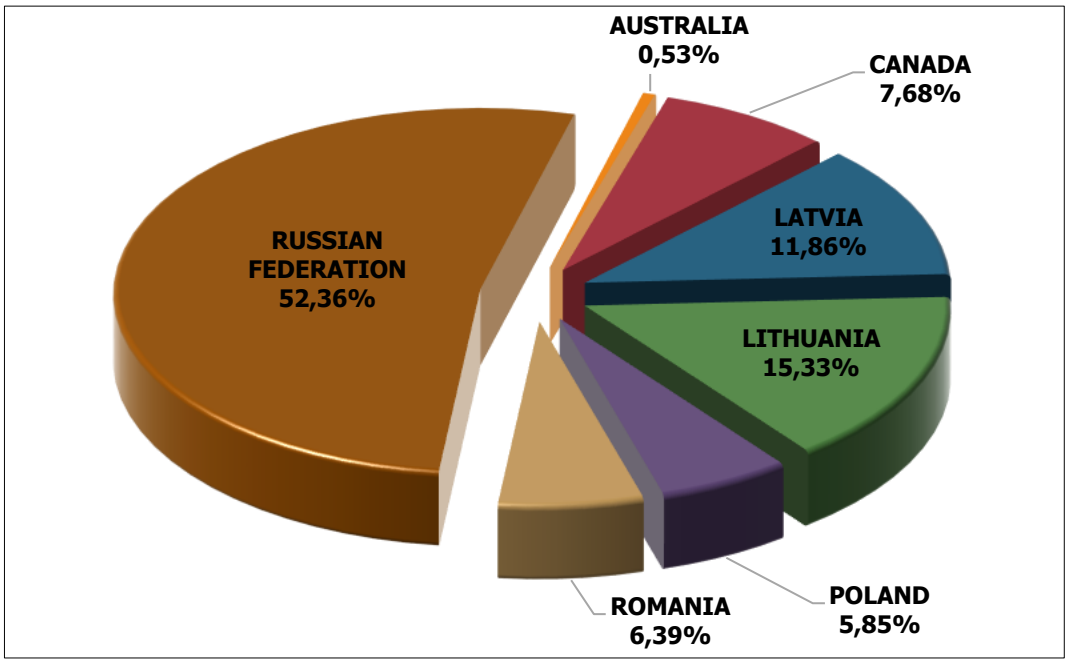
Please note that the area planted and production estimate of the non-commercial maize sector for the 2025 season will be released on 30 April 2025.

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 FEB25 Annexure A.

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

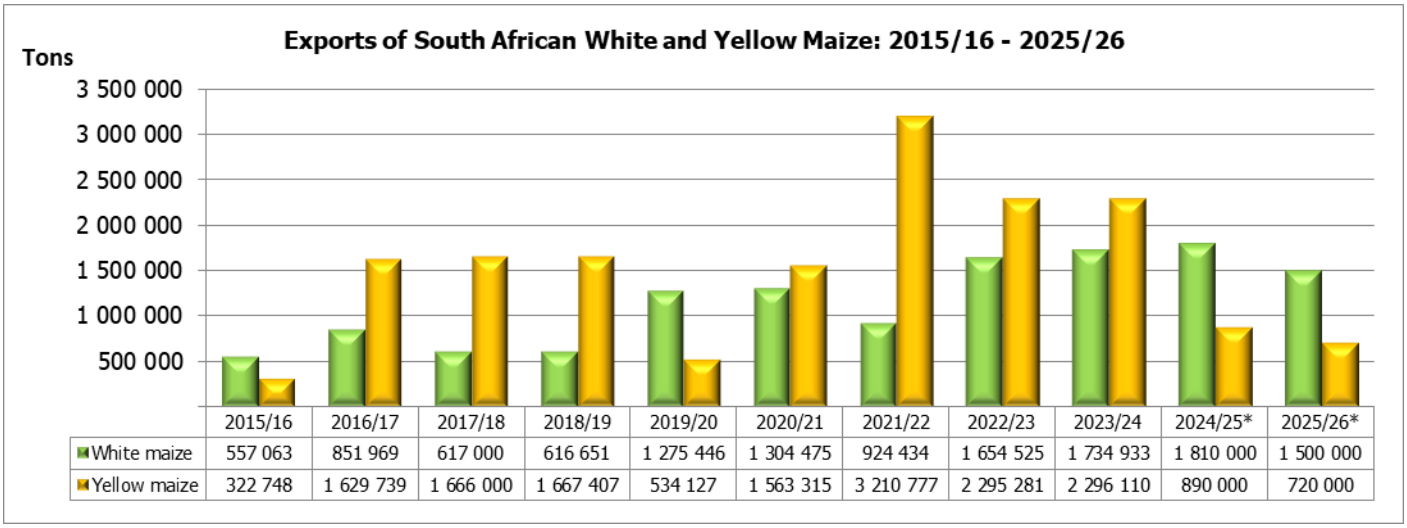
Graph 1: Major countries of wheat imports to South Africa: 2024/25 marketing year



- The progressive wheat imports (human consumption) for the 2024/25 marketing year (28 September 2024 to 28 February 2025) amount to 704 812 tons, with 52,36% or 369 028 tons from Russian Federation, followed by 15,33% or 108 044 tons from Lithuania, 11,86% or 83 568 tons from Latvia, 7,68% or 54 105 tons from Canada, 6,39% or 45 063 tons from Romania, 5,85% or 41 253 tons from Poland and only 0,53% or 3 751 tons from Australia. The exports of wheat (human consumption) for the above-mentioned period amount to 61 283 tons, of which 57,38% or 35 166 tons went to Zimbabwe, 17,95% or 10 999 tons went to Botswana, 9,86% or 6 043 tons went to Lesotho, 9,62% or 5 894 tons went to Zambia and 5,19% or 3 181 tons went to Namibia.

3.2 Exports of South African white and yellow maize

Graph 2: Exports of South African white and yellow maize: 2015/16 - 2025/26 marketing year



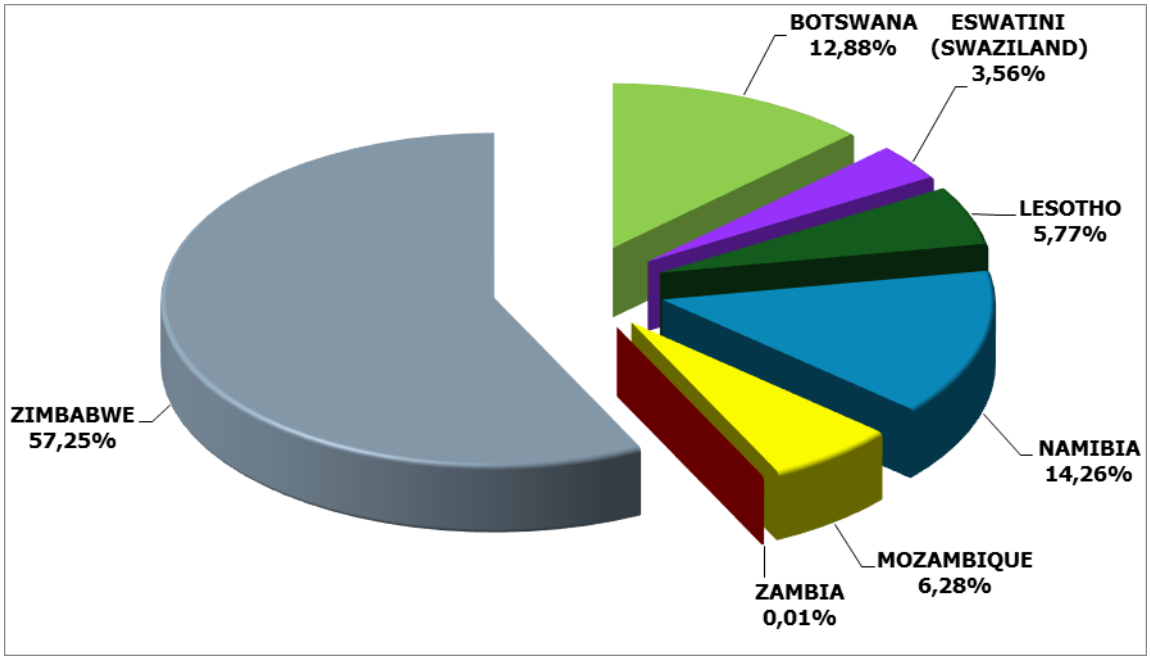
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25*	2025/26*
White maize	557 063	851 969	617 000	616 651	1 275 446	1 304 475	924 434	1 654 525	1 734 933	1 810 000	1 500 000
Yellow maize	322 748	1 629 739	1 666 000	1 667 407	534 127	1 563 315	3 210 777	2 295 281	2 296 110	890 000	720 000

*Projection

- The exports of white maize for the 2024/25 marketing year are projected at 1,810 million tons, which represents an increase of 4,33% or 75 067 tons compared to the 1,735 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 890 000 tons, which represents a decrease of 61,24% or 1,406 million tons compared to the 2,296 million tons of the previous marketing year.

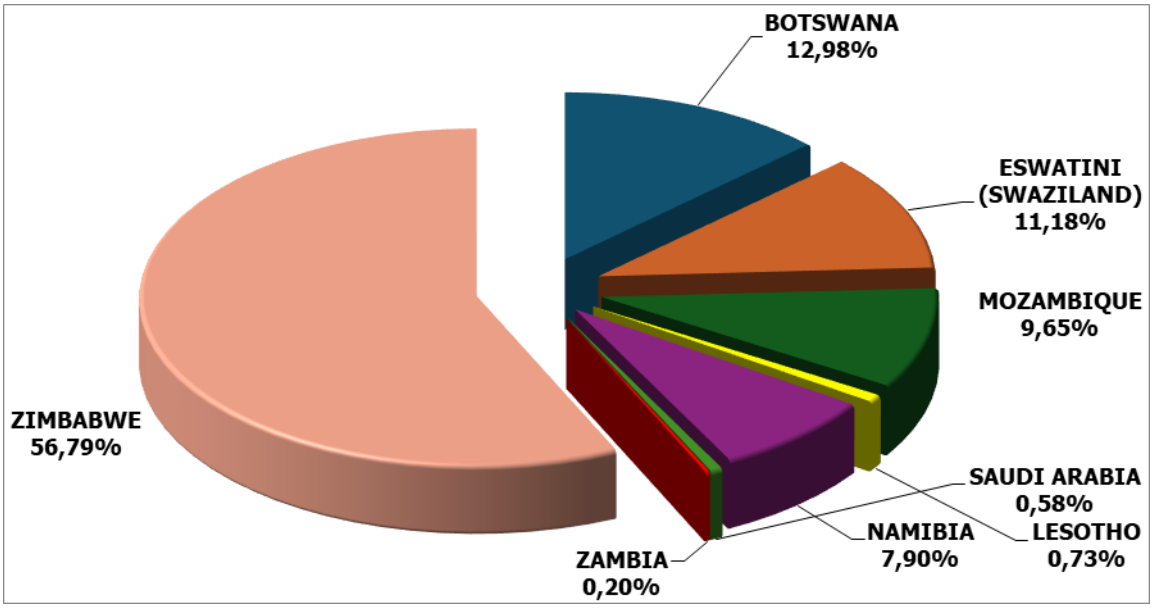
- The exports of white maize for the 2025/26 marketing year are projected at 1,500 million tons, which represents a decrease of 17,13% or 310 000 tons compared to the 1,810 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 720 000 tons, which represents a decrease of 19,10% or 170 000 tons compared to the 890 000 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 28 February 2025, progressive white maize exports for the 2024/25 marketing year amount to 1,295 million tons, with the main destinations being Zimbabwe (57,25% or 741 303 tons), followed by Namibia (14,26% or 184 645 tons), Botswana (12,88% or 166 746 tons), Mozambique (6,28% or 81 256 tons), Lesotho (5,77% or 74 690 tons), Eswathini (Swaziland) (3,56% or 46 054 tons) and Zambia (0,01% or 137 tons). The imports of white maize for the mentioned period amount to 55 749 tons, with the main origin being 100% or 55 749 tons from the United States.

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



- From 27 April 2024 to 28 February 2025, progressive yellow maize exports for the 2024/25 marketing year amount to 687 712 tons, with the main destinations being, Zimbabwe (56,79% or 390 525 tons), followed by

Botswana (12,98% or 89 278 tons), Eswathini (Swaziland) (11,18% or 76 854 tons), Mozambique (9,65% or 66 371 tons), Namibia (7,90% or 54 316 tons), Lesotho (0,73% or 4 990 tons), Saudi Arabia (0,58% or 4 022 tons) and Zambia (0,20% or 1 356 tons). The imports of yellow maize for the mentioned period amount to 670 499 tons, with the main origins being - 82,90% or 555 830 tons from Argentina, 15,76% or 105 707 tons from Brazil and 1,34% or 8 962 tons from the United States.

4. Market information

4.1 Consumer Price Index (CPI)

- Annual consumer price inflation was 3,2% in January 2025, up from 3,0% in December 2024. The CPI increased by 0,3% month-on-month in January 2025.
- The main contributors to the 3,2% annual inflation rate were:
    - Housing and utilities (4,5% and contributing 1,1%);
    - Food and non-alcoholic beverages (2,3% and contributing 0,4%); and
    - Restaurants and accommodation services (4,9% and contributing 0,3%).
- In January 2025, the annual inflation rate for goods was 2,4%, up from 1,9% in December 2024; and services was 4,0%, down from 4,2% in December 2024.

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 1,1% in January 2025, up from 0,7% in December 2024. The producer price index (PPI) increased by 0,5% month-on-month in January 2025. The main contributor to the headline PPI annual inflation rate was food products, beverages and tobacco products (4,4% and contributing 1,3%).
- The main positive contributors to the monthly rate were:
    - Furniture and other manufacturing (1,9% and contributing 0,1%);
    - Textiles, clothing and footwear (1,7% and contributing 0,1%);
    - Metals, machinery, equipment and computing equipment (0,9% and contributing 0,1%);
    - Transport equipment (0,9% and contributing 0,1%); and
    - Coke, petroleum, chemical, rubber and plastic products (0,5% and contributing 0,1%).
- The annual percentage change in the PPI for intermediate manufactured goods was 7,3% in January 2025, compared with 5,8% in December 2024. The index increased by 2,2% month-on-month. The main contributors to the annual rate were basic and fabricated metals (8,3% and contributing 4,2%) and chemicals, rubber and plastic products (8,3% and contributing 2,3%). The main contributor to the monthly rate was basic and fabricated metals (3,3% and contributing 1,7%).
- The annual percentage change in the PPI for electricity and water was 10,0% in January 2025, compared with 10,3% in December 2024. The index increased by 0,5% month-on-month. The contributors to the annual rate were electricity (10,9% and contributing 9,3%) and water (5,6% and contributing 0,8%). The contributor to the monthly rate was electricity (0,5% and contributing 0,5%).
- The annual percentage change in the PPI for mining was 0,7% in January 2025, compared with -1,5% in December 2024. The index increased by 2,8% month-on-month. The main contributor to the annual rate was gold and other metal ores (7,9% and contributing 2,2%). The main contributors to the monthly rate were gold and other metal ores (4,5% and contributing 1,3%) and coal and gas (4,7% and contributing 0,8%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was 7,5% in January 2025, compared with 4,7% in December 2024. The index decreased by 1,1% month-on-month. The main contributor to the annual rate was agriculture (8,2% and contributing 7,1%). The negative contributor to the monthly rate was agriculture (-1,3% and contributing -1,2%).

4.3 Future contract prices

Table 4: Closing prices on Wednesday, 5 March 2025

	5 March 2025	5 February 2025	% Change
RSA White Maize per ton (Mar. 2024 contract)	R5 250,00	R5 705,00	-7,98
RSA Yellow Maize per ton (Mar. 2024 contract)	R4 660,00	R5 079,00	-8,25
RSA Wheat per ton (Mar. 2024 contract)	R6 120,00	R6 031,00	1,48
RSA Sunflower seed per ton (Mar. 2024 contract)	R8 992,00	R9 542,00	-5,76
RSA Soya-beans per ton (Mar. 2024 contract)	R8 448,00	R9 157,00	-7,74
Exchange rate R/$	R18,39	R18,61	-1,18

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- January 2025 tractor sales of 457 units were almost 28% more than the 358 units sold in January 2024. Five combine harvesters were sold in January 2025, three less than the eight units sold in January last 2024.
- While January sales, particularly of tractors, were encouraging, there is little doubt that the industry is facing another challenging year. Many of the summer crops are quite patchy and it will only be at harvest time that farmers will be able to assess production of their crops. Some decision making by farmers on capital purchases will therefore be delayed. Nevertheless, the overall sentiment in the market is one of cautious optimism.
- The predicted fall in agricultural machinery sales back to 'normal' levels has occurred and tractor sales of approximately 6 200 units are likely for the 2025 calendar year. This is marginally down on the 6 465 units sold in 2024. Combine harvester sales of between 180 and 190 units are expected for 2025.

Table 5: Agricultural machinery sales

Equipment class	Year-on-year		Percentage	Year-to-date		Percentage
	January		**Change %**	**January**		**Change %**
	2025	**2024**		**2025**	**2024**	
Tractors	457	358	27,65	457	358	27,65
Combine harvesters	5	8	-37,50	5	8	-37,50

Source: SAAMA press release, February 2025

PLEASE NOTE: The Food Security Bulletin for March 2025 will be released on **4 April 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