MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA JANUARY 2025

Issued: 5 February 2025

Directorate: Statistics and Economic Analysis

- **According to the latest Seasonal Climate Watch of the South African Weather Service for the period February to June 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 preliminary area estimate for maize for 2025 is 2,646 million ha, which is 0,4% more than the 2,636 million ha planted for the previous season.**
- **Projected closing stocks of maize for the current 2024/25 marketing year are 664 832 tons, which is 72,4% less than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the current 2024/25 marketing year are 75 975 tons, which is 38,7% more than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2024/25 marketing year are 42 724 tons, which is 66,4% less than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the current 2024/25 marketing year are 128 977 tons, which is 59,8% less than the previous years' ending stocks.**
- **The annual percentage change in the CPI was higher at 3,0% in December 2024.**
- **The annual percentage change in the PPI for final manufactured goods was higher at 0,7% in December 2024.**
- **December 2024 tractor sales of 444 units were approximately 16% less than the 530 units sold in December 2023.**

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 QueenS@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 February to June 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 a 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 the full forecast period. This is in stark contrast to previous predictions and is most likely due to the sudden decrease in temperatures in equatorial pacific oceans, prompting a sharp increase in probability in getting above-normal rainfall. Below-normal rainfall is expected over the South-western parts of South Africa, however it is not their rainfall season yet, so no significant impact is expected.

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 maximum 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 February 2025 indicates that the country has approximately 81% of its full supply capacity (FSC) available, which is 10,0% less as compared to the corresponding period in 2024. The dam levels in most provinces show decreases in the full supply capacity as compared to 2024. The Northern Cape (-25%), Free State (-18%), North West (-6%), Eastern Cape (-5%), Mpumalanga (-3%), KwaZulu-Natal (-2%), Limpopo (-2%) and Gauteng (-1%) provinces, all show decreases in full supply capacity as compared to 2024. However, the Western Cape (2%) province show an improvement 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 February 2025

Province	Net FSC million cubic meters	03/02/2025 (%)	Last Year (2024) (%)	% Increase/Decrease 2025 vs. 2024
Eastern Cape	1 728	**81**	86	-5,0
Free State	15 657	**76**	94	-18,0
Gauteng	128	**91**	92	-1,0
Kingdom of Lesotho	2 363	**87**	98	-11,0
Kingdom of Eswatini	334	**100**	100	-
KwaZulu-Natal	4 910	**88**	90	-2,0
Limpopo	1 485	**84**	86	-2,0
Mpumalanga	2 538	**95**	98	-3,0
North West	866	**70**	76	-6,0
Northern Cape	146	**57**	82	-25,0
Western Cape	1 866	**74**	72	2,0
Total	32 020	**81**	91	**-10,0**

2. Grain production

2.1 Summer grain crops - 2025

The preliminary area estimate for summer grains for the 2025 season was released by the Crop Estimates Committee (CEC) on 28 January 2025, and is as follows:

Table 2: Commercial summer grains: Preliminary area planted - 2025 season

CROP	**Area planted** **2025** **Ha** **(A)**	Intentions[1)] 2025 Ha (B)	Area planted 2024 Ha (C)	Final estimate 2024 Tons (D)	Change 2025 vs 2024 % (A) ÷ (C)
Commercial:					
White maize	**1 599 700**	1 577 600	1 554 750	6 007 100	2,89%
Yellow maize	**1 046 500**	1 062 500	1 081 500	6 716 950	-3,24%
Total Maize	**2 646 200**	2 640 100	2 636 250	12 724 050	0,38%
Sunflower seed	**552 000**	539 700	529 000	635 750	4,35%
Soybeans	**1 122 500**	1 153 200	1 150 500	1 840 290	-2,43%
Groundnuts	**46 175**	40 000	41 200	51 745	12,08%
Sorghum	**39 500**	54 000	42 100	97 810	-6,18%
Dry beans	**45 500**	45 105	39 550	50 495	15,04%
TOTAL	**4 451 875**	4 472 105	4 438 600	15 400 140	0,30%

1) As mid October 2024
Note: Estimate is for calendar year, e.g. production season 2024/25 = 2025

- The preliminary area estimate for **maize** is 2,646 million. ha, which is 0,38% or 9 950 ha more than the 2,636 million ha planted for the previous season, and also 0,23% or 6 100 ha more than the intentions to plant figure of 2,640 million ha released in October 2024.
- The preliminary area estimate for **white maize** is 1,600 million ha, which represents an increase of 2,89% or 44 950 ha compared to the 1,555 million ha planted last season. In the case of **yellow maize**, the area estimate is 1,046 million ha, which is 3,24% or 35 000 ha less than the 1,082 million ha planted last season.
- The preliminary area estimate for **sunflower seed** is 552 000 ha, which is 4,35% or 23 000 ha more than the 529 000 ha planted the previous season.
- It is estimated that 1,122 million ha have been planted to **soybeans**, which represents a decrease of 2,43% or 28 000 ha compared to the 1,150 million ha planted last season.
- For **groundnuts**, the area estimate is 46 175 ha, which is 12,08% or 4 975 ha more than the 41 200 ha planted for the previous season.
- The area estimate for **sorghum** decreased by 6,18% or 2 600 ha, from 42 100 ha to 39 500 ha against the previous season.
- For **dry beans**, the area estimate is 45 500 ha, which is 15,04% or 5 950 ha more than the 39 550 ha planted for the previous season.

Please note that the revised area planted and first production forecast for summer field crops for 2025 will be released on 27 February 2025.

2.2 Winter cereal crops – 2024

The CEC also released the area planted and sixth production forecast of the winter cereals for the 2024 season on 28 January 2025.

Table 3: Winter cereals: Area planted and sixth production forecast – 2024 season

CROP	Area planted 2024 Ha (A)	6th Forecast 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**	**377 050**	107 600	377 000	0,01%
Canola	**165 750**	**287 445**	131 200	236 300	21,64%
Oats	**31 000**	**41 300**	27 500	41 000	0,73%
Sweet lupines	**16 000**	**19 200**	16 000	16 000	20,00%
Total winter	**818 750**	**2 649 885**	820 250	2 720 300	-2,59%

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 1,925 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 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 287 445 tons, which is 21,64% or 51 145 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 1,73 t/ha.
- The expected crop for **oats** for the 2024 season is 41 300 tons and the area planted is 31 000 ha. The expected yield is 1,33 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 final production estimate of winter crops for 2024 will be released on 27 February 2025.

2.3 Non-commercial maize - 2024

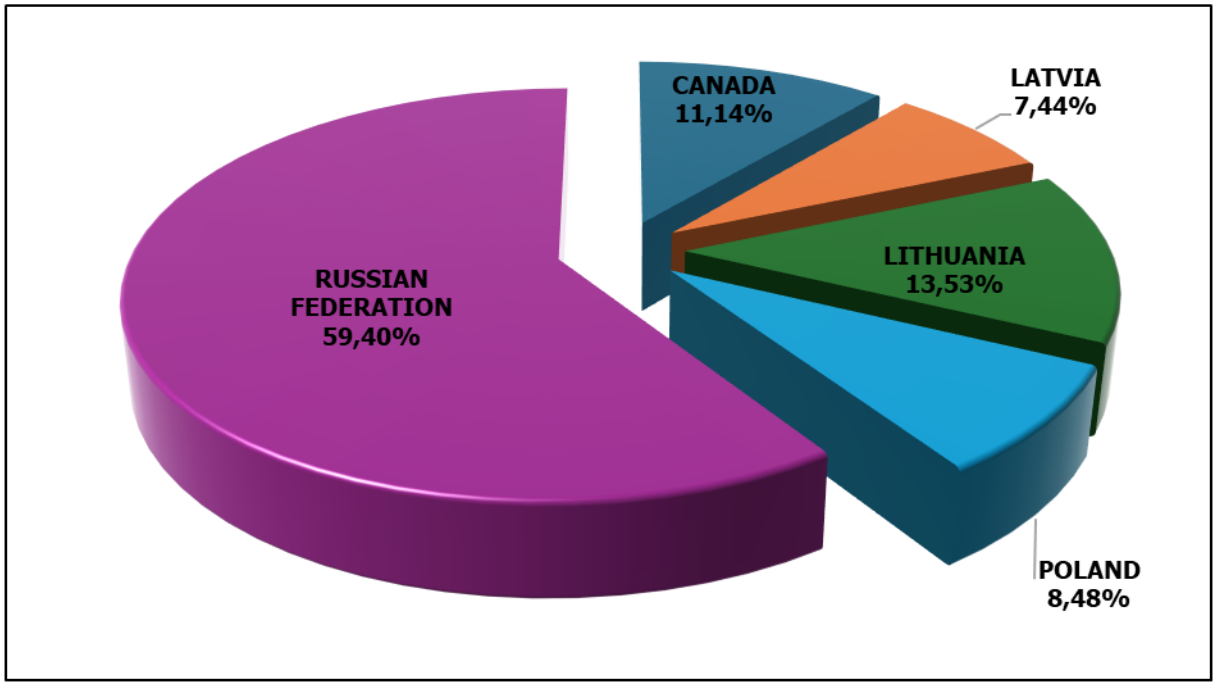
Please note that the area planted and production estimate of the non-commercial maize sector for the 2025 season will be released on 30 April 2025.

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 JAN25 Annexure A.

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

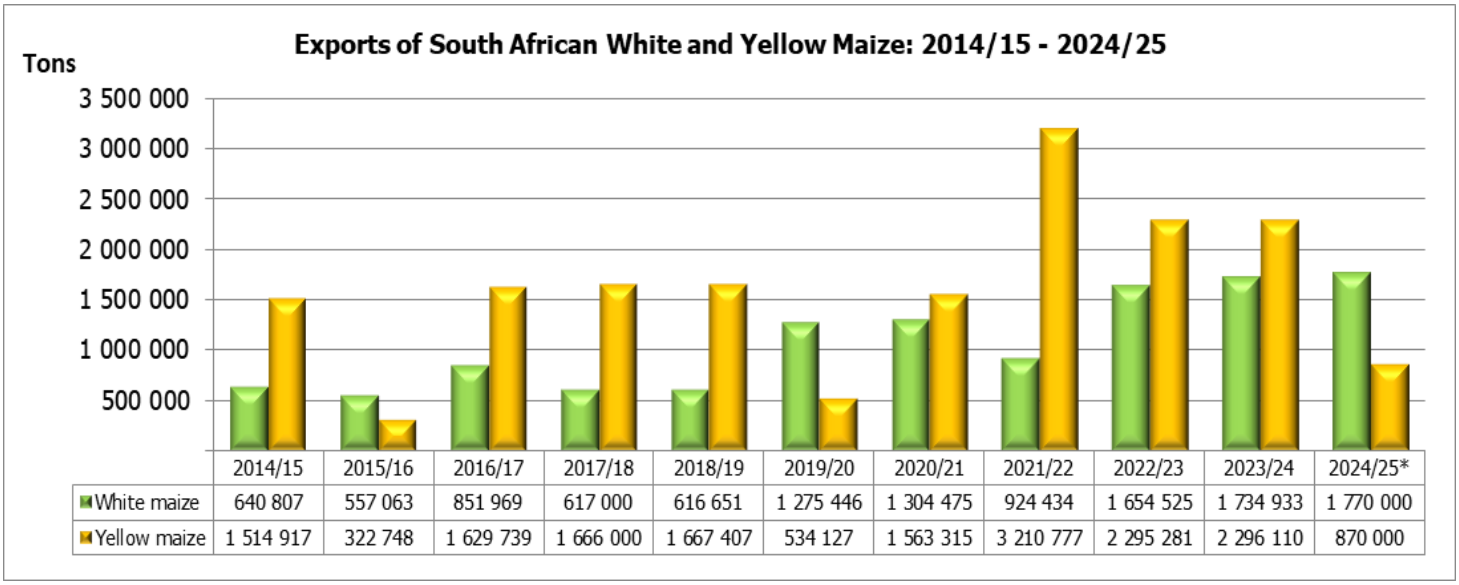
Graph 1: Major countries of wheat imports to South Africa: 2024/25 marketing year



The progressive wheat imports (human consumption) for the 2024/25 marketing year (28 September 2024 to 24 January 2025) amount to 485 795 tons, with 59,40% or 288 574 tons from Russian Federation, followed by 13,53% or 65 740 tons from Lithuania, 11,14% or 54 105 tons from Canada, 8,48% or 41 213 tons from Poland and only 7,44% or 36 163 tons from Latvia. The exports of wheat (human consumption) for the above-mentioned period amount to 27 862 tons, of which 62,38% or 17 380 tons went to Zimbabwe, 12,97% or 3 613 tons went to Botswana, 10,67% or 2 972 tons went to Lesotho, 8,47% or 2 359 tons went to Namibia and 5,52% 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

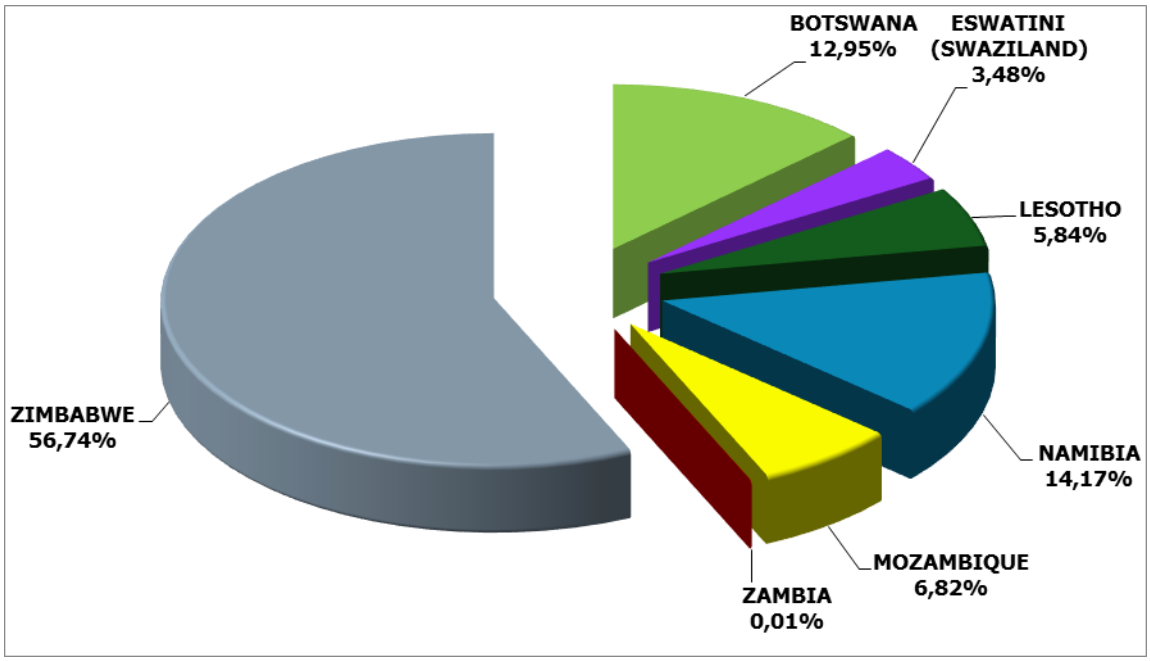


	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25*
White maize	640 807	557 063	851 969	617 000	616 651	1 275 446	1 304 475	924 434	1 654 525	1 734 933	1 770 000
Yellow maize	1 514 917	322 748	1 629 739	1 666 000	1 667 407	534 127	1 563 315	3 210 777	2 295 281	2 296 110	870 000

*Projection

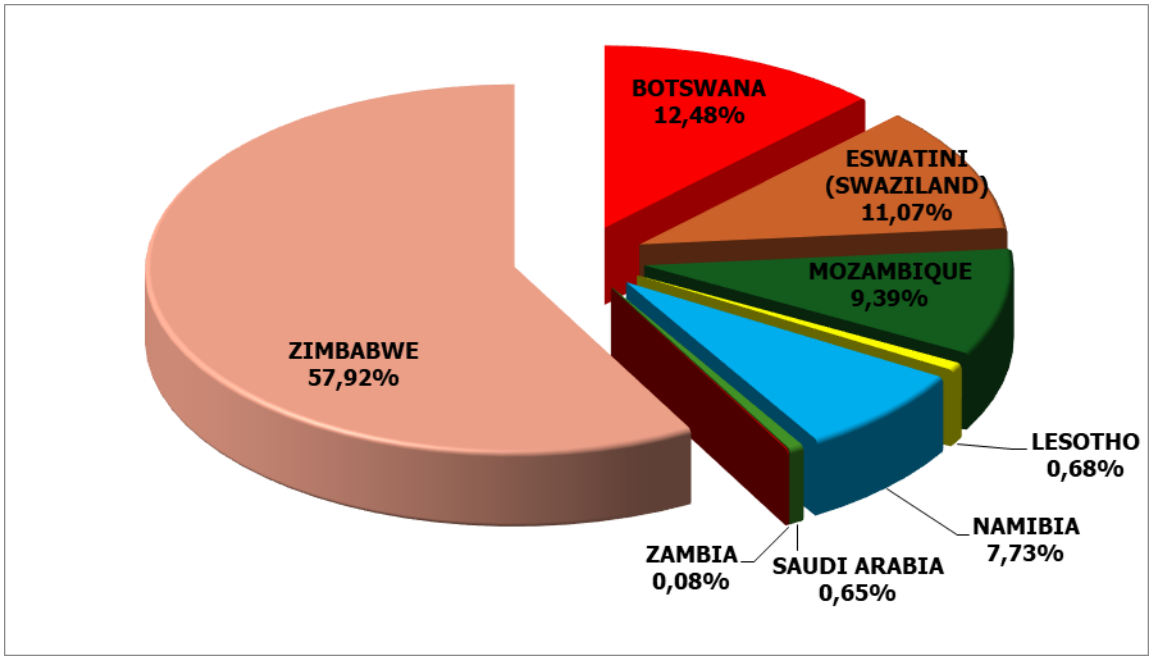
- The exports of white maize for the 2024/25 marketing year are projected at 1,770 million tons, which represents an increase of 2,02% or 35 067 tons compared to the 1,735 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 870 000 tons, which represents a decrease of 62,11% or 1,426 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 24 January 2025, progressive white maize exports for the 2024/25 marketing year amount to 1,136 million tons, with the main destinations being Zimbabwe (56,74% or 644 757 tons), followed by Namibia (14,17% or 160 995 tons), Botswana (12,95% or 147 113 tons), Mozambique (6,82% or 77 460 tons), Lesotho (5,84% or 66 405 tons), Eswathini (Swaziland) (3,48% or 39 545 tons) and Zambia (0,01% or 137 tons). The imports of white maize for the mentioned period amount to 21 124, with the main origin being 100% or 21 124 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 24 January 2025, progressive yellow maize exports for the 2024/25 marketing year amount to 622 528 tons, with the main destinations being, Zimbabwe (57,92% or 360 559 tons), followed by Botswana (12,48% or 77 681 tons), Eswathini (Swaziland) (11,07% or 68 931 tons), Mozambique (9,39% or 58 457 tons), Namibia (7,73% or 48 132 tons), Saudi Arabia (0,65% or 4 022 tons), Lesotho (0,68% or 4 258 tons) and Zambia (0,08% or 488 tons). The imports of yellow maize for the mentioned period amount to

494 243, with the main origins being - 78,61% or 388 536 tons from Argentina and 21,39% or 105 707 tons from Brazil.

4. Market information

4.1 Consumer Price Index (CPI)

- Annual consumer price inflation was 3,0% in December 2024, up from 2,9% in November 2024. The CPI increased by 0,1% month-on-month in December 2024.
- The main contributors to the 3,0% annual inflation rate were:
  - Housing and utilities (4,4% and contributing 1,0%);
  - Miscellaneous goods and services (6,6% and contributing 1,0%);
  - Food and non-alcoholic beverages (2,5% and contributing 0,5%); and
  - Alcoholic beverages and tobacco (4,3% and contributing 0,3%).
- In December 2024, the annual inflation rate for goods was 1,9%, up from 1,6% in November 2024; and services was 4,2%, down from 4,3% in November 2024.
- Average annual consumer price inflation was 4,4% in 2024 (i.e. the average CPI for all urban areas for 2024 compared with that for 2023). This was 1,6% lower than the corresponding average of 6,0% in 2023.

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 0,7% in December 2024, up from -0,1% in November 2024. The producer price index (PPI) increased by 0,2% month-on-month in December 2024. The main contributor to the headline PPI annual inflation rate was food products, beverages and tobacco products (4,2% and contributing 1,2%). The contributors to the monthly rate were food products, beverages and tobacco products (0,4% and contributing 0,1%) and coke, petroleum, chemical, rubber and plastic products (0,4% and contributing 0,1%).
- The annual percentage change in the PPI for intermediate manufactured goods was 5,8% in December 2024, compared with 5,7% in November 2024. The index increased by 0,6% month-on-month. The main contributors to the annual rate were basic and fabricated metals (2,6%) and chemicals, rubber and plastic products (2,4%). The main contributors to the monthly rate were chemicals, rubber and plastic products (0,3%) and textiles and leather goods (0,2%).
- The annual percentage change in the PPI for electricity and water was 10,3% in December 2024, compared with 11,2% in November 2024. The index decreased by 1,2% month-on-month. Electricity contributed 9,4% and water contributed 0,9% to the annual rate. The contributor to the monthly rate was electricity (-1,2%).
- The annual percentage change in the PPI for mining was -1,5% in December 2024, compared with -0,2% in November 2024. The index decreased by 2,2% month-on-month. The main negative contributor to the annual rate was coal and gas (-2,5%). The negative contributors to the monthly rate were coal and gas (-1,8%) and non-ferrous metal ores (-1,0%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was 4,7% in December 2024, compared with 3,6% in November 2024. The index decreased by 0,4% month-on-month. The main contributor to the annual rate was agriculture (4,3%). The contributor to the monthly rate was agriculture (-0,4%).

4.3 Future contract prices

Table 4: Closing prices on Monday, 3 February 2025

	3 February 2025	3 January 2025	% Change
RSA White Maize per ton (Feb. 2024 contract)	R6 516,00	R6 534,00	-0,28
RSA Yellow Maize per ton (Feb. 2024 contract)	R5 475,00	R5 461,00	0,26
RSA Wheat per ton (Feb. 2024 contract)	R5 980,00	R6 166,00	-3,02
RSA Sunflower seed per ton (Feb. 2024 contract)	R9 950,00	R10 183,00	-2,29
RSA Soya-beans per ton (Feb. 2024 contract)	R8 441,00	R7 961,00	6,03
Exchange rate R/$	R18,93	R18,80	0,69

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- December tractor sales of 444 units were approximately 16% less than the 530 units sold in December 2023. Overall tractor sales in the 2024 calendar year were approximately 23% down on 2023. Six combine harvesters were sold in December 2024, 26 less than the 32 units sold in December 2023. Overall combine harvester sales in the 2024 calendar year were approximately 60% down on 2023.
- Most summer crops are at a critical stage and further rain will be required until at least the end of February to sustain these crops. As a result, farmers will continue to be cautious about their decisions to buy new agricultural machinery.
- 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 200 and 220 units are expected for 2025.

Table 5: Agricultural machinery sales

Equipment class	Year-on-year December 2024	Year-on-year December 2023	Percentage Change %	Year-to-date December 2024	Year-to-date December 2023	Percentage Change %
Tractors	444	530	-16,23	6 465	8 373	-22,79
Combine harvesters	6	32	-81,25	201	506	-60,28

Source: SAAMA press release, January 2025

PLEASE NOTE: The Food Security Bulletin for February 2025 will be released on **7 March 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