MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA NOVEMBER 2024

Issued: 5 December 2024

Directorate: Statistics and Economic Analysis

- **During November 2024, significant rainfall events were limited to the central and eastern half of the country, as well as the southern coastal areas of the country.**
- **The expected commercial wheat crop for 2024 is 1,940 million tons, which is 5,4% 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 667 878 tons, which includes imports of 1,8 million tons. It is also 10,9% less than the previous years' ending stocks**
- **The expected commercial maize crop for 2024 is 12,724 million tons, which is 22,6% less than the 16,430 million tons of the previous season (2023).**
- **Projected closing stocks of maize for the current 2024/25 marketing year are 735 532 tons, which is 69,4% less than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the current 2024/25 marketing year are 67 675 tons, which is 23,6% more than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2024/25 marketing year are 44 104 tons, which is 65,3% less than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the current 2024/25 marketing year are 135 757 tons, which is 57,7% less than the previous years' ending stocks.**
- **The annual percentage change in the CPI was lower at 2,8% in October 2024.**
- **The annual percentage change in the PPI for final manufactured goods was lower at -0,7% in October 2024.**
- **October 2024 tractor sales of 765 units were approximately 26% less than the 1 031 units sold in October 2023.**

agriculture, land reform & rural development

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Contents

1. Weather conditions

1.1 Rainfall for November 2024

During November 2024, significant rainfall events were limited to the central and eastern half of the country, as well as the southern coastal areas of the country (**Figure 1**). Comparing rainfall totals to the long-term average for November 2024, rainfall received was near-normal to below-normal over most parts of the country with isolated areas of above-normal rainfall evident over Eastern Cape, KwaZulu-Natal, Free State, Mpumalanga, North West and Limpopo provinces (**Figure 2**). (Source: Directorate: Climate Change and Disaster Management of Department: Agriculture, Land Reform and Rural Development).

Figure 1: Rainfall (mm) for November 2024

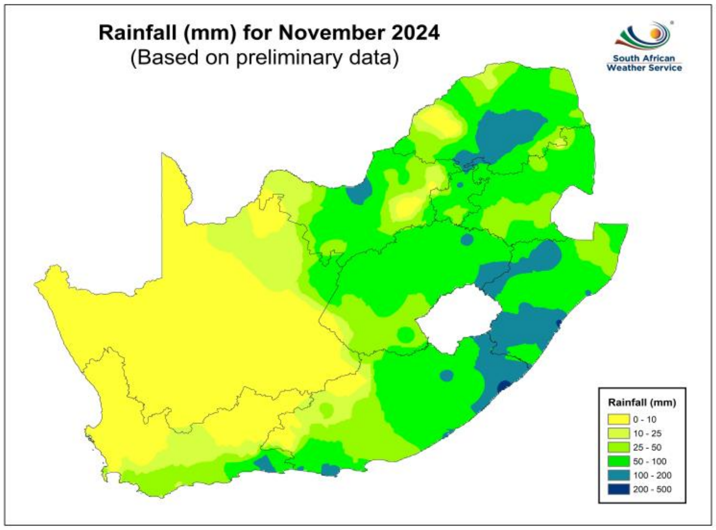
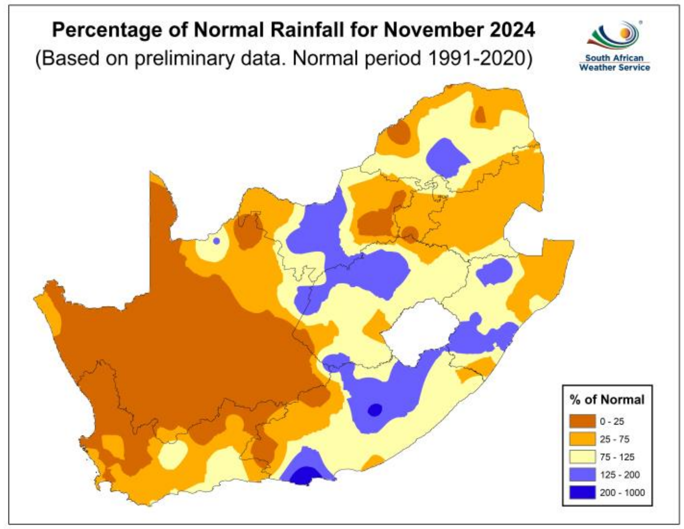


Figure 2: Percentage rainfall for November 2024



1.2 Level of dams

Available information on the level of South Africa's dams on 2 December 2024 indicates that the country has approximately 76% of its full supply capacity (FSC) available, which is 10,0% less as compared to the corresponding period in 2023. The dam levels in all provinces show decreases in the full supply capacity as compared to 2023. The North West (-21%), Mpumalanga (-14%), Northern Cape (-13%), Free State (-13%), Limpopo (-10%), Gauteng (-9%), KwaZulu-Natal (-2%) and Eastern Cape (-1%) provinces, all show decreases in full supply capacity as compared to 2023. However, only the Western Cape (3%) province shows an improvement in full supply capacity, while the Eastern Cape province remained the same as compared to 2023. 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, 2 December 2024

Province	Net FSC million cubic meters	**2/12/2024 (%)**	Last Year (2023) (%)	% Increase/Decrease 2024 vs. 2023
Eastern Cape	1 728	84	85	-1,0
Free State	15 657	73	86	-13,0
Gauteng	128	84	93	-9,0
Kingdom of Lesotho*	2 363	81	88	-7,0
Kingdom of Eswatini*	334	68	100	-32,0
KwaZulu-Natal	4 910	79	81	-2,0
Limpopo	1 485	69	79	-10,0
Mpumalanga	2 538	77	91	-14,0
North West	867	57	78	-21,0
Northern Cape	147	67	80	-13,0
Western Cape	1 918	92	89	3,0
Total	**32 075**	**76**	**86**	**-10,0**

2. Grain production

2.1 Summer grain crops - 2024

The area planted and final production estimate for summer grains for the 2024 season was released by the Crop Estimates Committee (CEC) on 27 November 2024, and is as follows:

Table 2: Commercial summer grains: 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 estimate 2023 Tons (D)	Change 2024 vs 2023 % (B) ÷ (D)
Commercial:					
White maize	**1 554 750**	**6 007 100**	1 521 300	8 505 000	-29,37
Yellow maize	**1 081 500**	**6 716 950**	1 064 800	7 925 000	-15,24
Total Maize	**2 636 250**	**12 724 050**	2 586 100	16 430 000	-22,56
Sunflower seed	**529 000**	**635 750**	555 700	720 000	-11,70
Soybeans	**1 150 500**	**1 840 290**	1 148 300	2 770 000	-33,56
Groundnuts	**41 200**	**51 745**	31 300	53 000	-2.37
Sorghum	**42 100**	**97 810**	34 000	94 360	3,66
Dry beans	**39 550**	**50 495**	36 650	50 260	0,47
TOTAL	**4 438 600**	**15 400 140**	4 392 050	20 117 620	-23,45

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.
- The expected **commercial maize crop** is 12 724 050 tons, which is 22,56% or 3,706 million tons less than the 16 430 000 tons of the previous season (2023). The yield for maize is 4,83 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 6 007 100 tons, which is 29,37% or 2,498 million tons less than the 8 505 000 tons of last season. The yield for white maize is 3,86 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 6 716 950 tons, which is 15,24% or 1,208 million tons less than the 7 925 000 tons of last season. The yield for yellow maize is 6,21 t/ha.
- The 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 635 750 tons, which is 11,70% or 84 250 tons less than the 720 000 tons of the previous season. The expected yield is 1,20 t/ha.
- It is estimated that 1 150 500 ha have been planted to **soybeans**, which represents an increase of 0,19% or 2 200 ha compared to the 1 148 300 ha planted last season. The production forecast is 1 840 290 tons, which is 33,56% or 929 710 tons less than the 2 770 000 tons of the previous season. The expected yield is 1,60 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 51 745 tons – which is 2,37% or 1 255 tons less than the 53 000 tons of last season. The expected yield is 1,26 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 97 810 tons, which is 3,66% or 3 450 tons more than the 94 360 tons of the previous season. The expected yield is 2,32 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 50 495 tons, which is 0,47% or 235 tons more than the 50 260 tons of the previous season. The expected yield is 1,28 t/ha.

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 fourth production forecast of the winter cereals for the 2024 season on 27 November 2024.

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

CROP	**Area planted 2024** **Ha** **(A)**	**4th Forecast 2024** **Tons** **(B)**	Area planted 2023 Ha (C)	Final crop 2023 Tons (D)	Change % (B) ÷ (D)
Commercial:					
Wheat	**505 300**	**1 939 640**	537 950	2 050 000	-5,38%
Barley	**100 700**	**371 535**	107 600	377 000	-1,45%
Canola	**165 750**	**295 445**	131 200	236 300	25,03%
Oats	**31 000**	**56 300**	27 500	41 000	37,32%
Sweet lupines	**16 000**	**19 200**	16 000	16 000	20,00%
Total winter	**818 750**	**2 682 120**	820 250	2 720 300	-1,40%

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 1,940 million tons, which is 5,38 % or 110 360 tons less than the previous seasons' crop of 2,050 mill. tons, whilst the expected yield is 3,84 t/ha.
- The expected production in the Western Cape is 1,104 million tons (57%), which is 20 000 tons more than the 1,084 million tons produced in the previous season. In the Northern Cape, 285 000 tons (15%) is expected to be produced – 7 000 tons less than the 292 000 tons produced in the previous season. In the Free State, the expected production is 222 950 tons (12%), which is 57 850 tons less than the previous seasons' crop of 280 800 tons.
- The production forecast for **barley** is 371 535 tons, which is 1,45% or 5 465 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 3,69 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 56 300 tons and the area planted is 31 000 ha. The expected yield is 1,82 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 fifth production forecast of winter crops for 2024 will be released on 19 December 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

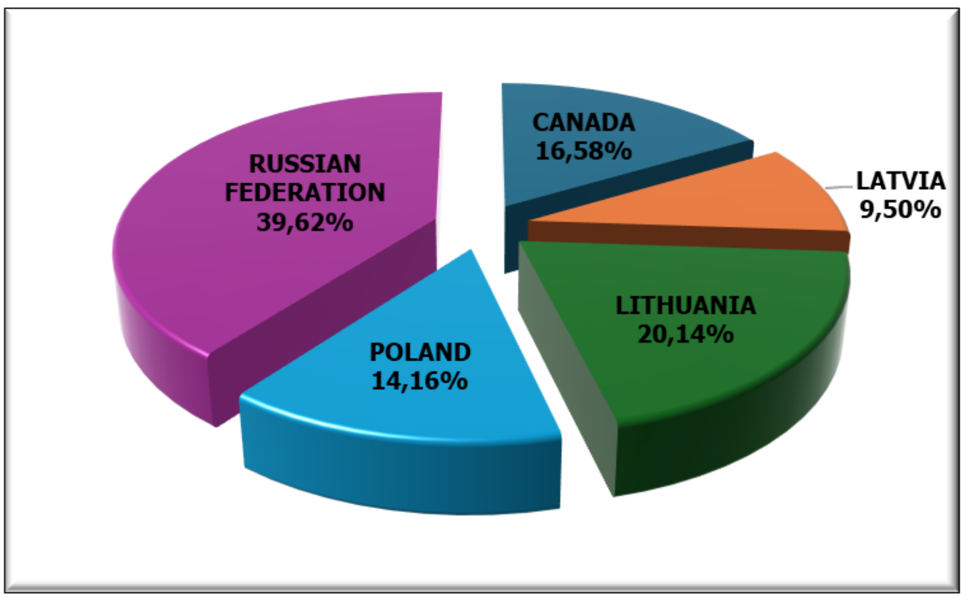
- The area planted to maize in the non-commercial agricultural sector is estimated at 347 000 ha, which represents a decrease of 3,24%, compared to the 358 620 ha of the previous season. The expected maize crop for this sector is 575 000 tons, which is 13,41% less than the 664 040 tons of last season. 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 NOV24 Annexure A.

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

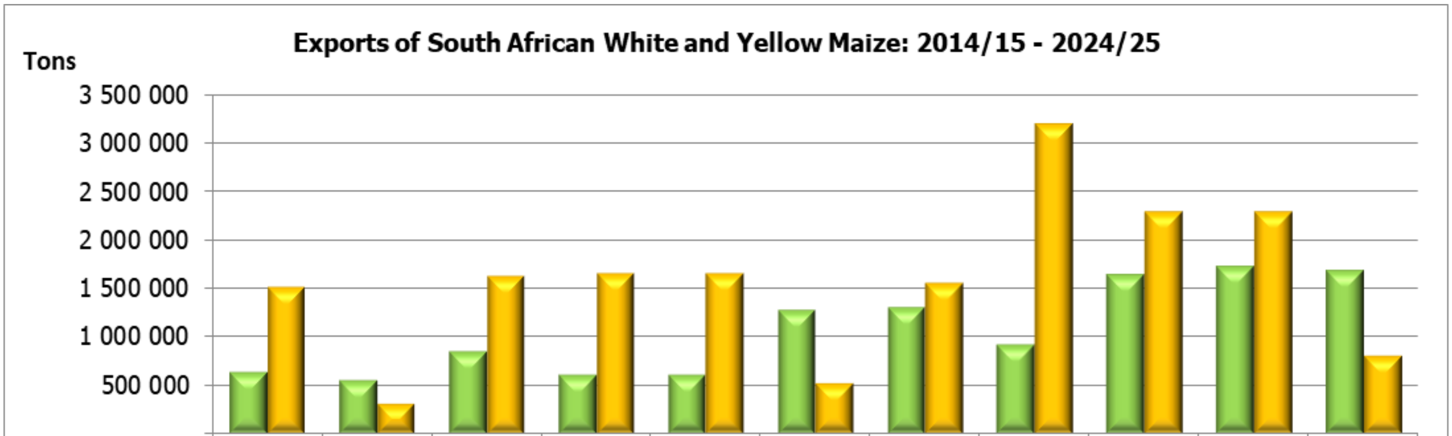
Graph 1: Major countries of wheat imports to South Africa: 2024/25 marketing year



The progressive wheat imports (human consumption) for the 2024/25 marketing year (28 September to 29 November 2024) amount to 326 315 tons, with 39,62% or 129 287 tons from Russian Federation, followed by 20,14% or 65 717 tons from Lithuania, 16,58% or 54 105 tons from Canada, 14,16% or 46 217 tons from Poland and only 9,50% or 30 989 tons from Latvia. The exports of wheat (human consumption) for the above-mentioned period amount to 13 404 tons, of which 33,58% or 4 501 tons went to Zimbabwe, 22,51% or 3 017 tons went to Lesotho, 17,60% or 2 359 tons went to Namibia, 14,84% or 1 989 tons went to Botswana and 11,47% 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

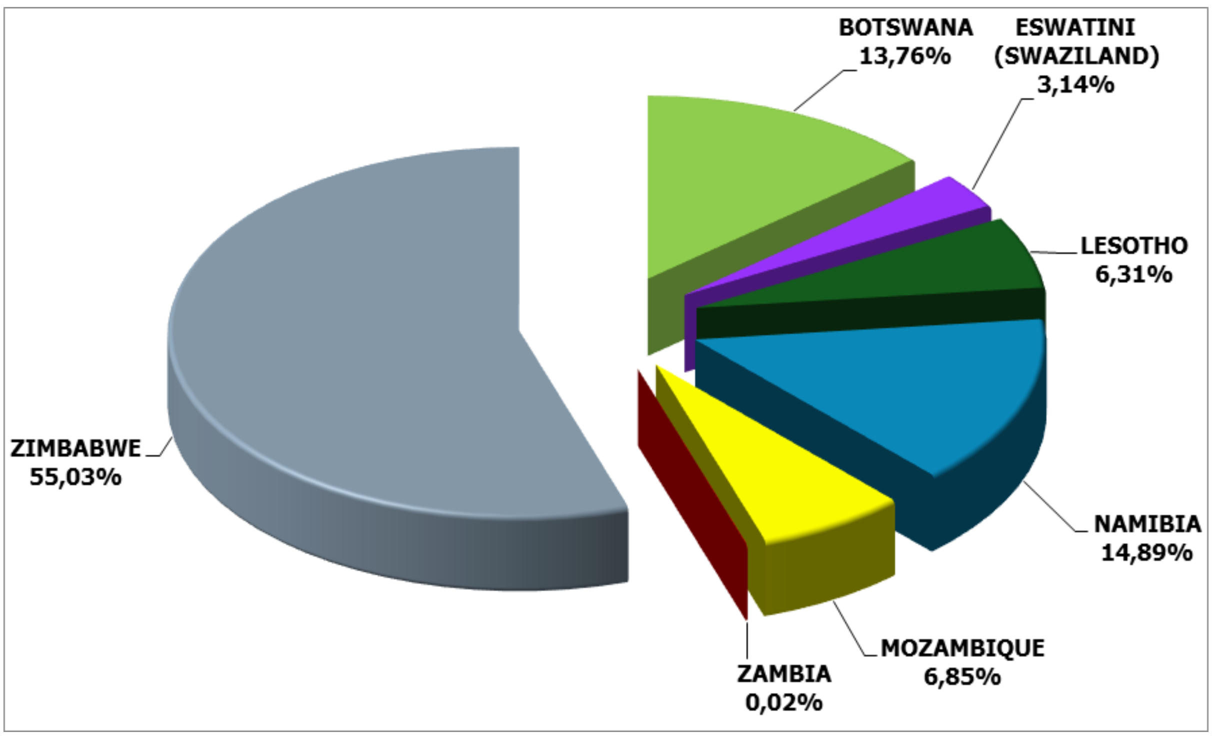


	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25*
White maize	640 807	557 063	851 969	617 000	616 651	1 275 446	1 304 475	924 434	1 654 525	1 734 933	1 690 000
Yellow maize	1 514 917	322 748	1 629 739	1 666 000	1 667 407	534 127	1 563 315	3 210 777	2 295 281	2 296 110	815 000

*Projection

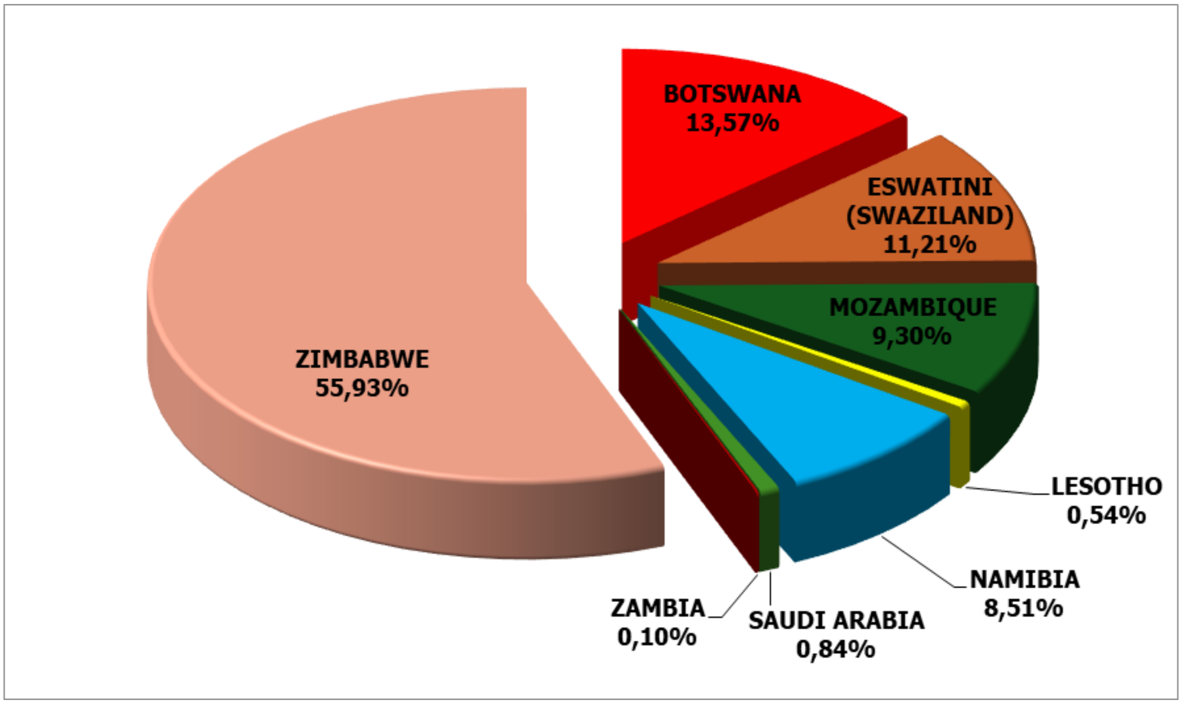
- The exports of white maize for the 2024/25 marketing year are projected at 1,690 million tons, which represents a decrease of 2,59% or 44 933 tons compared to the 1,735 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 815 000 tons, which represents a decrease of 64,51% or 1,481 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 to 29 November 2024, progressive white maize exports for the 2024/25 marketing year amount to 886 932 tons, with the main destinations being Zimbabwe (55,03% or 488 073 tons), followed by Namibia (14,89% or 132 024 tons), Botswana (13,76% or 122 074 tons), Mozambique (6,85% or 60 769 tons), Lesotho (6,31% or 56 005 tons), Eswathini (Swaziland) (3,14% or 27 850 tons) and Zambia (0,02% or 137 tons). The imports of white maize for the mentioned period amount to zero.

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



- From 27 April to 29 November 2024, progressive yellow maize exports for the 2024/25 marketing year amount to 479 423 tons, with the main destinations being, Zimbabwe (55,93% or 268 124 tons), followed by Botswana (13,57% or 65 051 tons), Eswathini (Swaziland) (11,21% or 53 755 tons), Mozambique (9,30% or 44 601 tons), Namibia (8,51% or 40 793 tons), Saudi Arabia (0,84% or 4 022 tons), Lesotho (0,54% or 2 589 tons) and Zambia (0,10% or 488 tons). The imports of yellow maize for the mentioned period amount to 342 579, with the main origins being - 84,01% or 287 784 tons from Argentina and 15,99% or 54 795 tons from Brazil.

4. Market information

4.1 Consumer Price Index (CPI)

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

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was -0,7% in October 2024, down from 1,0% in September 2024. The producer price index (PPI) decreased by 0,7% month-on-month in October 2024.
- The main negative contributor to the headline PPI annual inflation rate was coke, petroleum, chemical, rubber and plastic products (-10,1% and contributing -2,5%). The main negative contributors to the headline PPI monthly decrease were coke, petroleum, chemical, rubber and plastic products (-2,4% and contributing -0,6%) and paper and printed products (-3,2% and contributing -0,3%).

- The annual percentage change in the PPI for intermediate manufactured goods was 5,5% in October 2024, compared with 4,8% in September 2024. The index decreased by 0,4% month-on-month. The main contributors to the annual rate were basic and fabricated metals (2,5%) and chemicals, rubber and plastic products (2,2%). The contributors to the monthly rate were basic and fabricated metals (-0,2%), sawmilling and wood (-0,1%) and chemicals, rubber and plastic products (-0,1%).
- The annual percentage change in the PPI for electricity and water was 11,2% in October 2024, compared with 9,8% in September 2024. The index decreased by 0,8% month-on-month. Electricity contributed 10,3% and water contributed 0,9% to the annual rate. Electricity contributed -0,7% to the monthly rate.
- The annual percentage change in the PPI for mining was -4,8% in October 2024, unchanged from September 2024. The index increased by 1,2% month-on-month. The main negative contributors to the annual rate were non-ferrous metal ores (-4,7%) and coal and gas (-2,2%). The main contributors to the monthly rate were non-ferrous metal ores (0,7%) and gold and other metal ores (0,6%).
- The annual percentage change in the PPI for agriculture, forestry and fishing was -0,3% in October 2024, compared with 3,6% in September 2024. The index increased by 2,9% month-on-month. The negative contributor to the annual rate was agriculture (-0,7%). The contributor to the monthly rate was agriculture (2,9%).

4.3 Future contract prices

Table 5: Closing prices on Wednesday, 4 December 2024

	4 December 2024	4 November 2024	% Change
RSA White Maize per ton (Nov. 2024 contract)	R6 337,00	R5 860,00	8,14
RSA Yellow Maize per ton (Nov. 2024 contract)	R5 098,00	R4 765,00	6,99
RSA Wheat per ton (Nov. 2024 contract)	R5 926,00	R5 810,00	19,96
RSA Sunflower seed per ton (Nov. 2024 contract)	R10 530,00	R10 805,00	-2,54
RSA Soya-beans per ton (Nov. 2024 contract)	R8 950,00	R8 712,00	2,73
Exchange rate R/$	R18,15	R17,51	3,66

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- October 2024 tractor sales of 765 units were approximately 26% less than the 1 031 units sold in October 2023. Year-to-date tractor sales are now approximately 23% down on last year. Twenty-eight combine harvesters were sold in October 2024, 11 less than the 39 units sold in October 2023. On a year-to-date basis, combine harvester sales are now approximately 59% down on last year.
- Although market sentiment is still one of cautious optimism, farmers are watching the skies and many are waiting for planting rains. Rainfall has been very patchy up to now. The La Niña phenomenon is still neutral, but predictions are that general rains should start in mid-November and be favourable for the rest of the summer-cropping season.
- With tractor and combine harvester sales being well down on last year, they are showing a return to 'normal' levels. This means that we can expect tractor sales of around 6 500 units and combine harvester sales of approximately 250 units for the 2024 calendar year.

Table 6: Agricultural machinery sales

	Year-on-year		Percentage	Year-to-date		Percentage
	October		Change	October		Change
Equipment class	**2024**	**2023**	%	**2024**	**2023**	%
Tractors	765	1 031	-25,80	5 498	7 158	-23,19
Combine harvesters	28	39	-28,21	182	440	-58,64

Source: SAAMA press release, November 2024

PLEASE NOTE: The Food Security Bulletin for December 2024 will be released on **15 January 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