MONTHLY FOOD SECURITY BULLETIN OF SOUTH AFRICA SEPTEMBER 2024

Issued: 7 October 2024

Directorate: Statistics and Economic Analysis

- **During September 2024, significant rainfall events were limited to the coastal regions of the country, as well as most of KwaZulu-Natal and isolated areas of the Free State Province.**
- **The expected commercial wheat crop for 2024 is 1,939 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 2023/24 marketing year are 741 459 tons, which includes imports of 1,9 million tons. It is also 31,6% more than the previous years' ending stocks.**
- **The projected closing stocks of wheat for the current 2024/25 marketing year are 760 959 tons, which includes imports of 1,9 million tons. It is also 2,6% more than the previous years' ending stocks**
- **The expected commercial maize crop for 2024 is 12,801 million tons, which is 22,1% 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 955 282 tons, which is 60,3% less than the previous years' ending stocks.**
- **The projected closing stocks of sorghum for the current 2024/25 marketing year are 71 890 tons, which is 24,5% more than the previous years' ending stocks.**
- **The projected closing stocks of sunflower seed for the current 2024/25 marketing year are 48 494 tons, which is 61,8% less than the previous years' ending stocks.**
- **The projected closing stocks of soybeans for the current 2024/25 marketing year are 144 327 tons, which is 55,0% less than the previous years' ending stocks.**
- **The annual percentage change in the CPI was lower at 4,4% in August 2024.**
- **The annual percentage change in the PPI for final manufactured goods was lower at 2,8% in August 2024.**
- **August 2024 tractor sales of 574 units were approximately 18% less than the 697 units sold in August 2023.**

agriculture, land reform & rural development

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1. Weather conditions

1.1 Rainfall for September2024

During September 2024, significant rainfall events were limited to the coastal regions of the country, as well as most of KwaZulu-Natal and isolated areas of the Free State Province (**Figure 1**). Comparing rainfall totals to the long-term average for September 2024, rainfall received was above-normal over the central interior and into KwaZulu-Natal, as well as isolated areas of the Northern Cape, Western Cape and Eastern Cape provinces (**Figure 2**). The remaining parts of the country received near-normal to below-normal rainfall. (Source: Directorate: Climate Change and Disaster Management of Department: Agriculture, Land Reform and Rural Development).

Figure 1: Rainfall (mm) for September 2024

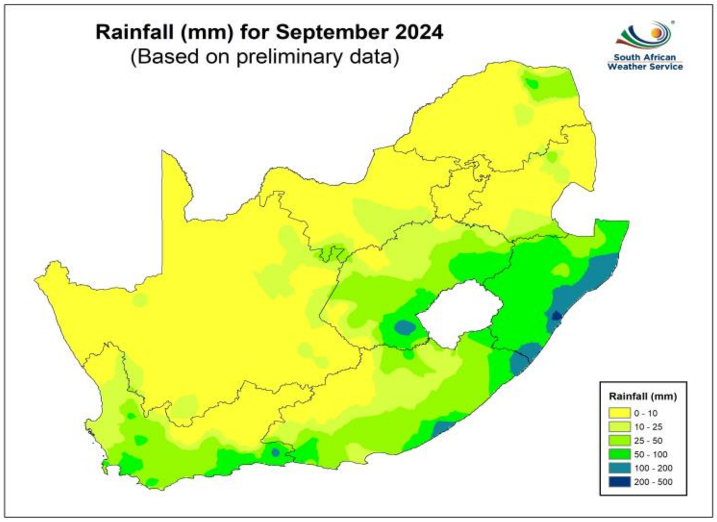
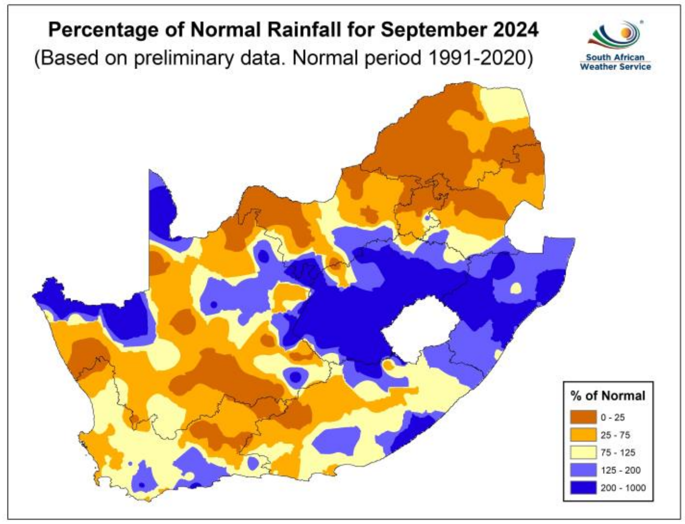


Figure 2: Percentage rainfall for September 2024



1.2 Level of dams

Available information on the level of South Africa's dams on 30 September 2024 indicates that the country has approximately 80% 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 (-17%), Free State (-14%), Northern Cape (-10%), Limpopo (-10%), Mpumalanga (-9%), Gauteng (-7%), Eastern Cape (-7%), KwaZulu-Natal (-1%) and Western Cape (-1%) provinces, all show decreases in full supply capacity 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, 30 September 2024

Province	Net FSC million cubic meters	**30/09/2024 (%)**	Last Year (2023) (%)	% Increase/Decrease 2024 vs. 2023
Eastern Cape	1 730	77	84	-7,0
Free State	15 657	78	92	-14,0
Gauteng	128	89	96	-7,0
Kingdom of Lesotho*	2 363	78	89	-11,0
Kingdom of Eswatini*	334	82	96	-14,0
KwaZulu-Natal	4 910	85	86	-1,0
Limpopo	1 485	74	84	-10,0
Mpumalanga	2 538	84	93	-9,0
North West	867	66	83	-17,0
Northern Cape	149	77	87	-10,0
Western Cape	1 866	95	96	-1,0
Total	**32 027**	**80**	**90**	**-10,0**

Source: Department of Water and Sanitation

2. Grain production

2.1 Summer grain crops - 2024

The area planted and eighth production forecast for summer grains for the 2024 season was released by the Crop Estimates Committee (CEC) on 26 September 2024, and is as follows:

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

CROP	**Area planted 2024 Ha (A)**	**8th 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**	**6 084 250**	1 521 300	8 505 000	-28,46
Yellow maize	**1 081 500**	**6 716 950**	1 064 800	7 925 000	-15,24
Total Maize	**2 636 250**	**12 801 200**	2 586 100	16 430 000	-22,09
Sunflower seed	**529 000**	**635 750**	555 700	720 000	-11,70
Soybeans	**1 150 500**	**1 810 790**	1 148 300	2 770 000	-34,63
Groundnuts	**41 200**	**51 745**	31 300	53 000	-2.37
Sorghum	**42 100**	**95 830**	34 000	94 360	1,56
Dry beans	**39 550**	**50 495**	36 650	50 260	0,47
TOTAL	**4 438 600**	**15 445 810**	4 392 050	20 117 620	-23,22

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 12 801 200 tons, which is 22,0% or 3,629 million tons less than the 16 430 000 tons of the previous season (2023). The yield for maize is 4,86 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 6 084 250 tons, which is 28,46% or 2,421 million tons less than the 8 505 000 tons of last season. The yield for white maize is 3,91 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 1 810 790 tons, which is 34,63% or 959 210 tons less than the 2 770 000 tons of the previous season. The expected yield is 1,57 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 95 830 tons, which is 1,56% or 1 470 tons more than the 94 360 tons of the previous season. The expected yield is 2,28 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 nineth production forecast for summer field crops for 2024 will be released on 29 October 2024.

2.2 Winter cereal crops – 2024

The CEC also released the revised area planted and second production forecast of the winter cereals for the 2024 season on 26 September 2024.

Table 3: Winter cereals: Revised area planted and second production forecast – 2024 season

CROP	**Area planted 2024** Ha (A)	**2nd Forecast 2024** Tons (B)	Area planted 2023 Ha (C)	Final crop 2023 Tons (D)	Change % (B) ÷ (D)
Commercial:					
Wheat	**505 300**	**1 938 600**	537 950	2 050 000	-5,43%
Barley	**100 700**	**398 535**	107 600	377 000	5,71%
Canola	**165 750**	**294 645**	131 200	236 300	24,69%
Oats	**31 000**	**68 300**	27 500	41 000	66,59%
Sweet lupines	**16 000**	**19 200**	16 000	16 000	20,00%
Total winter	**818 750**	**2 719 280**	820 250	2 720 300	-0,04%

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 1,939 million tons, which is 5,43 % or 111 400 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, 277 400 tons (14%) is expected to be produced – 14 600 tons less than the 292 000 tons produced in the previous season. In the Free State, the expected production is 227 850 tons (12%), which is 52 950 tons less than the previous seasons' crop of 280 800 tons.
- The production forecast for **barley** is 398 535 tons, which is 5,71% or 21 535 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 3,96 t/ha.
- The expected **canola crop** is 294 645 tons, which is 24,69% or 58 345 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 68 300 tons and the revised area planted is 31 000 ha. The expected yield is 2,20 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 third production forecast of winter crops for 2024 will be released on 29 October 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

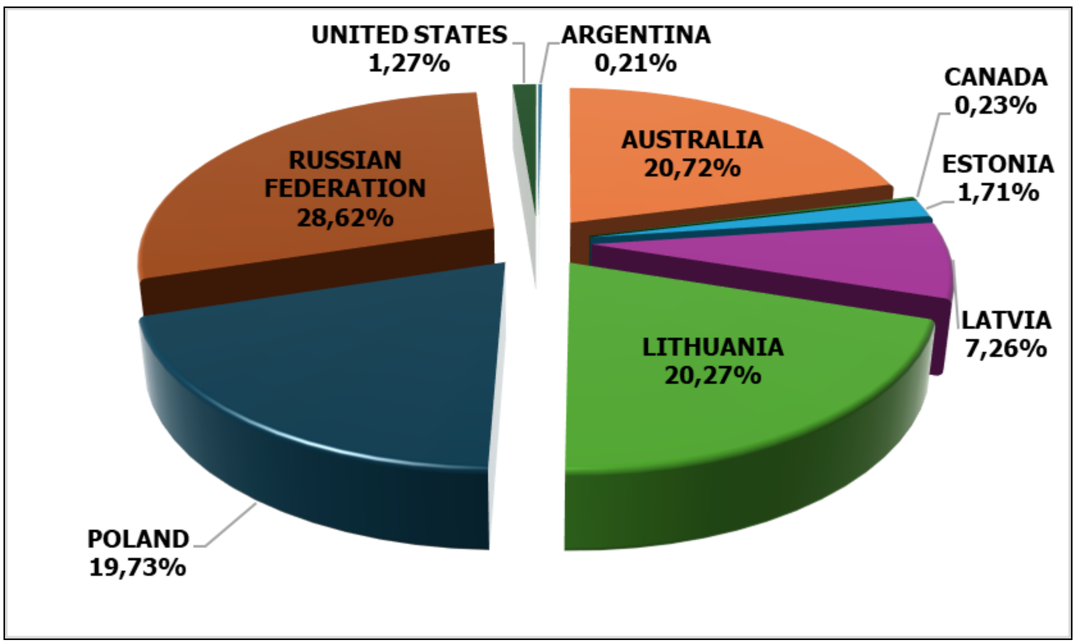
- The area planted to maize in the non-commercial agricultural sector is estimated at 347 000 ha, which represents a decrease of 3,24%, compared to the 358 620 ha of the previous season. The expected maize crop for this sector is 575 000 tons, which is 13,41% less than the 664 040 tons of last season. 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 SEP24 Annexure A.

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

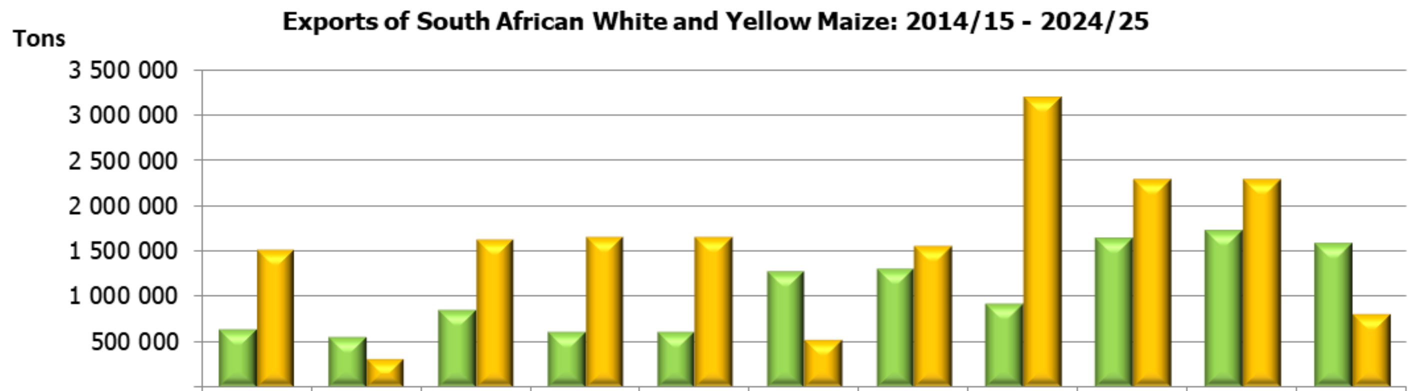
Graph 1: Major countries of wheat imports to South Africa: 2023/24 marketing year



- The progressive wheat imports (human consumption) for the 2023/24 marketing year (30 September 2023 to 27 September 2024) amount to 1 896 597 tons, with 28,62% or 542 734 tons from the Russian Federation, followed by 20,72% or 392 936 tons from Australia, 20,27% or 384 475 tons from Lithuania, 19,73% or 374 147 tons from Poland, 7,26% or 137 608 tons from Latvia, 1,71% or 32 441 tons from Estonia, 1,27% or 24 057 tons from the United States, 0,23% or 4 300 tons from Canada and only 0,21% or 3 899 tons from Argentina. The exports of wheat (human consumption) for the above-mentioned period amount to 212 813 tons, of which 31,01% or 65 989 tons went to Zambia, 28,86% or 61 424 tons went to Zimbabwe, 19,03% or 40 508 tons went to Botswana, 15,34% or 32 638 tons went to Lesotho, 5,29% or 11 255 tons went to Namibia and only 0,47% or 999 tons went to Congo.

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

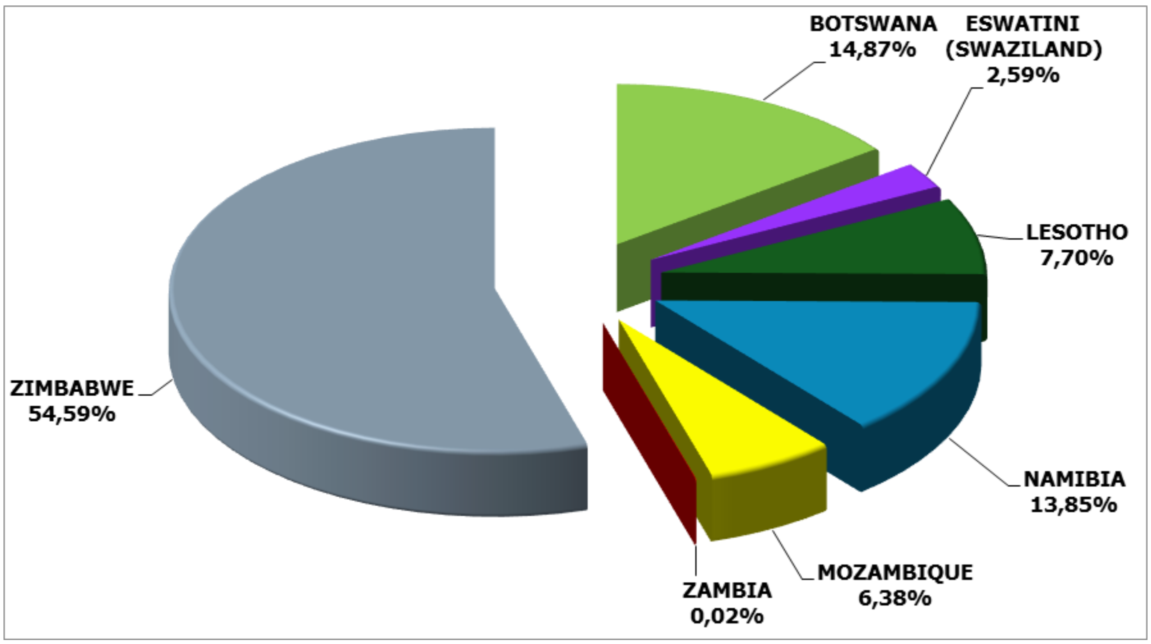


	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25*
White maize	640 807	557 063	851 969	617 000	616 651	1 275 446	1 304 475	924 434	1 654 525	1 734 933	1 590 000
Yellow maize	1 514 917	322 748	1 629 739	1 666 000	1 667 407	534 127	1 563 315	3 210 777	2 295 281	2 296 110	815 000

*Projection

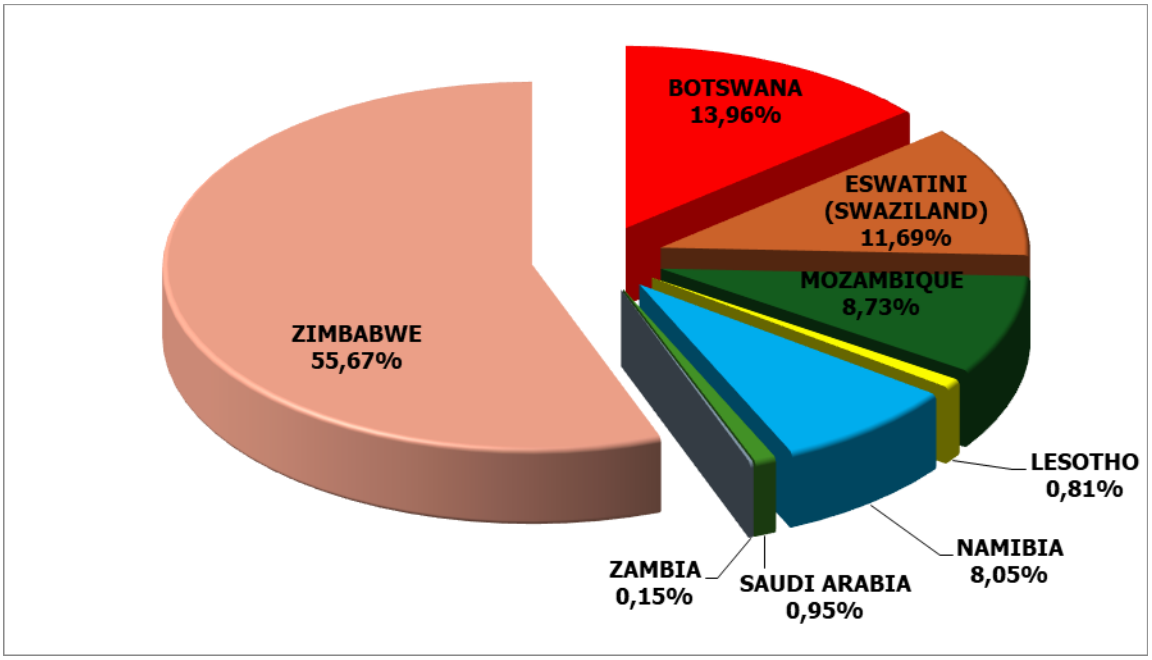
- The exports of white maize for the 2024/25 marketing year are projected at 1,590 million tons, which represents a decrease of 8,35% or 144 933 tons compared to the 1,735 million tons of the previous marketing year. Yellow maize exports for the mentioned period are projected at 815 000 tons, which represents 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 27 September 2024, progressive white maize exports for the 2024/25 marketing year amount to 610 414 tons, with the main destinations being Zimbabwe (54,59% or 333 253 tons), followed by Botswana (14,87% or 90 761 tons), Namibia (13,85% or 84 536 tons), Lesotho (7,70% or 47 003 tons), Mozambique (6,38% or 38 924 tons), Eswathini (Swaziland) (2,59% or 15 800 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 27 September 2024, progressive yellow maize exports for the 2024/25 marketing year amount to 318 907 tons, with the main destinations being, Zimbabwe (55,67% or 177 539 tons), followed by Botswana (13,96% or 44 508 tons), Eswathini (Swaziland) (11,69% or 37 279 tons), Mozambique (8,73% or 27 825 tons), Namibia (8,05% or 25 671 tons), Saudi Arabia (0,95% or 3 016 tons), Lesotho (0,81% or 2 581 tons) and Zambia (0,15% or 488 tons). The imports of yellow maize for the mentioned period amount to 219 797 (100%) tons from Argentina.

4. Market information

4.1 Consumer Price Index (CPI)

- Annual consumer price inflation was 4,4% in August 2024, down from 4,6% in July 2024. The CPI increased by 0,1% month-on-month in August 2024.
- The main contributors to the 4,4% annual inflation rate were:
  - Housing and utilities (4,8% and contributing 1,1%);
  - Miscellaneous goods and services (7,0% and contributing 1,0%);
  - Food and non-alcoholic beverages (4,7% and contributing 0,9%); and
  - Transport (2,8% and contributing 0,4%).
- In August 2024, the annual inflation rate of goods was 4,4%, down from 4,6% in July 2024; and services was 4,5%, down from 4,7% in July 2024.

4.2 Producer Price Index (PPI)

- Annual producer price inflation (final manufacturing) was 2,8% in August 2024, down from 4,2% in July 2024. The producer price index (PPI) decreased by 0,3% month-on-month in August 2024.
- The main contributors to the headline PPI annual inflation rate were:
  - Food products, beverages and tobacco products (3,6% and contributing 1,1%);
  - Metals, machinery, equipment and computing equipment (3,5% and contributing 0,5%); and
  - Coke, petroleum, chemical, rubber and plastic products (2,1% and contributing 0,5%).
- The main negative contributors to the headline PPI monthly decrease were coke, petroleum, chemical, rubber and plastic products (-0,5% and contributing -0,1%), as well as metals, machinery, equipment and computing equipment (-0,5% and contributing -0,1%).

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

4.3 Future contract prices

Table 5: Closing prices on Friday, 4 October 2024

	4 October 2024	4 September 2024	% Change
RSA White Maize per ton (Oct. 2024 contract)	R5 520,00	R5 481,00	0,71
RSA Yellow Maize per ton (Oct. 2024 contract)	R4 434,00	R4 047,00	9,56
RSA Wheat per ton (Oct. 2024 contract)	R5 965,00	R6 200,00	-3,79
RSA Sunflower seed per ton (Oct. 2024 contract)	R9 641,00	R9 107,00	5,86
RSA Soya-beans per ton (Oct. 2024 contract)	R8 700,00	R8 623,00	0,89
Exchange rate R/$	R17,45	R17,91	-2,57

Source: JSE/SAFEX

4.4 Agricultural machinery sales

- August 2024 tractor sales of 574 units were approximately 18% less than the 697 units sold in August 2023. Year-to-date tractor sales are now approximately 25% down on last year. Five combine harvesters were sold in August 2024, 19 less than the 24 units sold in August 2023. On a year-to-date basis, combine harvester sales are now 64% down on last year.
- As the year unfolds, several different factors are affecting buying decisions in the market. As predicted, the overall market is now moving to a more realistic level, after three years where annual tractor sales were over 7 500 units. Market sentiment, whilst it is optimistic, it is also showing a strong degree of caution. Weighted against this is a short-term situation where conditions will be highly competitive in terms of pricing and availability of stock. Current industry expectations are that tractor sales will be between 20 and 25% down on last year.

Table 6: Agricultural machinery sales

Equipment class	Year-on-year August 2024	Year-on-year August 2023	Percentage Change %	Year-to-date August 2024	Year-to-date August 2023	Percentage Change %
Tractors	574	697	-17,65	4 073	5 412	-24,74
Combine harvesters	5	24	-79,17	137	383	-64,23

Source: SAAMA press release, September 2024

PLEASE NOTE: The Food Security Bulletin for October 2024 will be released on **7 November 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