TRENDS

IN THE
AGRICULTURAL SECTOR

2024

agriculture, land reform& rural development

Agriculture, Land Reform and Rural Development
REPUBLIC OF SOUTH AFRICA

2030 NDP

STAY SAFE
VACCINATE TO SAVE SOUTH AFRICA
TOGETHER WE CAN BEAT CORONAVIRUS

Trends
in the
Agricultural Sector
2024

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ECONOMIC REVIEW OF THE SOUTH AFRICAN AGRICULTURE FOR THE YEAR ENDED 30 JUNE 2024

Summary

Gross farming income, which was earned from agricultural production, increased by R6 186 million (1,4%) and was estimated at R452 100 million in 2023/24, compared to R445 915 million in 2022/23. The increase was due to the increase in income from horticultural and animal products by 10,3% and 6,1%, respectively.

The prices received from the agricultural products increased on average by 5,5% in 2023/24, compared to the increase of 11,5% in 2022/23.

The weighted average price of field crops decreased by 2,2%, mainly due to the decrease in prices of winter and summer grains by 10,0% and 6,7%, respectively. The prices of sugar cane increased by 19,8%, oilseeds by 12,1%, dry beans by 5,3% and cotton by 1,3%.

The weighted average price of horticultural products increased by 11,8% and was driven by the increase in prices of fruit by 13,0%, vegetables (10,7%) and viticulture (9,7%.

The weighted average price of animal products increased by 6,0% due to the increase in the price of poultry meat by 18,8%. The prices of slaughtered stock decreased by 4,7% and pastoral products by 4,1%, while the price of milk remained unchanged.

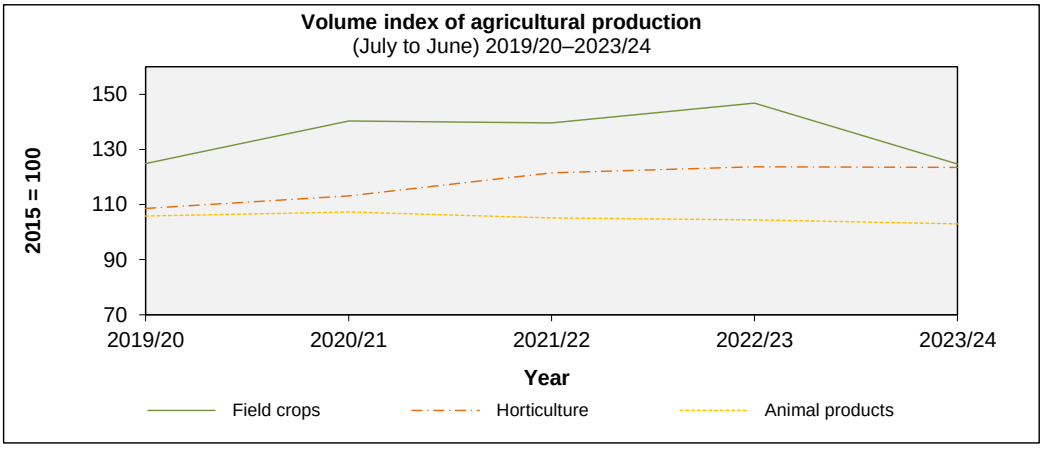
The prices paid for farming requisites, including machinery and implements, material for fixed improvements as well as intermediate goods and services showed a decrease of 7,9% for the period ended under review, compared to the increase of 7,9% the previous period. This was largely influenced by the decrease in prices of animal health and crop protection by 21,6%, fertilisers by 10,0% and feeds by 4,4%.

The domestic terms of trade increased by 15,5% from 1,03 to 1,19 due to better prices that were received from agricultural products.

The net farming income increased by 1,8% and estimated at R128 025 million for the period ended June 2024, compared to R125 818 million in the previous corresponding period.

Volume of agricultural production

The estimated volume of agricultural production in 2023/24 was 5,0% less than in 2022/23.



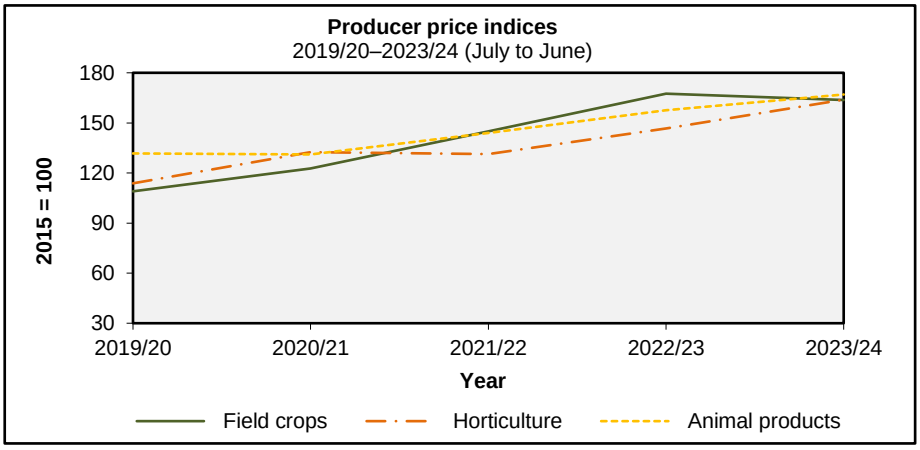
The volume of field crop production decreased by 15,1% during 2023/24, mainly because of a decrease in the production of summer crops (maize), as well as oilseeds (sunflower seed and soya beans). Furthermore, the production of other non-food crops (cotton, tobacco, wattle bark and lucerne seed) also decreased as compared to 2022/23.

Horticultural production decreased by 0,2% for the abovementioned period, which can mainly be attributed to a decrease in the production of deciduous fruits (apricots, peaches, plums and apples), citrus fruits (oranges, grapefruits and naartjes) and subtropical fruits (paw-paws, granadillas, bananas, litchis, pineapples and mangoes). Furthermore, the production of dried fruits and nuts also contributed to a decrease in horticultural products as compared to the previous season.

Animal production decreased by 1,3%, mainly because of the decreases in the production of eggs and poultry meat, as well as the number of stocks slaughtered (calves and pork) as compared to 2022/23.

Producer prices of agricultural products

The prices received from the agricultural products increased on average by 5,5% in 2023/24, compared to the increase of 11,5% in 2022/23. This was mainly driven by the increase in prices of horticultural products by 11,8% and animal products 6,0%.



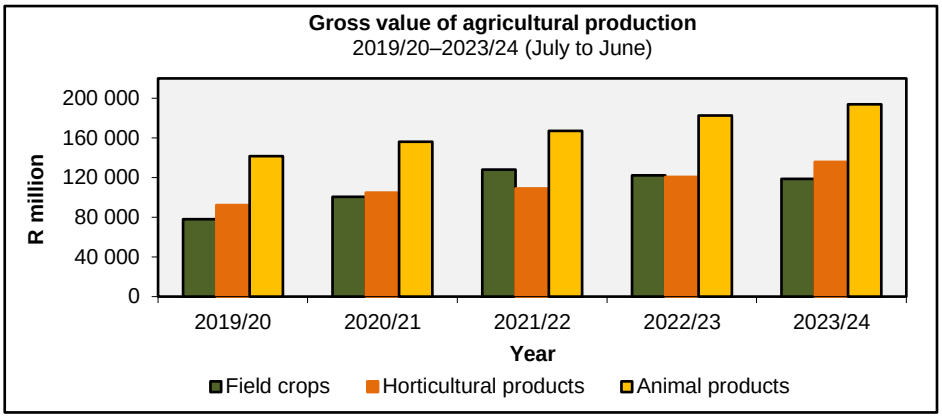
The weighted average price of field crops decreased by 2,2% due to the decrease in prices of winter and summer grains by 10,0% and 6,7%, respectively. The prices of sugar cane increased by 19,8%, oilseeds by 12,1%, dry beans by 5,3% and cotton by 1,3%.

The weighted average price of horticultural products increased by 11,8% due to the increase in prices of fruit by 13,0%, vegetables (10,7%) and viticulture (9,7%.

The weighted average price of animal products increased by 6,0% due to the increase in the price of poultry meat by 18,8%. The prices of slaughtered stock decreased by 4,7% and pastoral products by 4,1%, while the price of milk remained unchanged.

Gross value of agricultural production

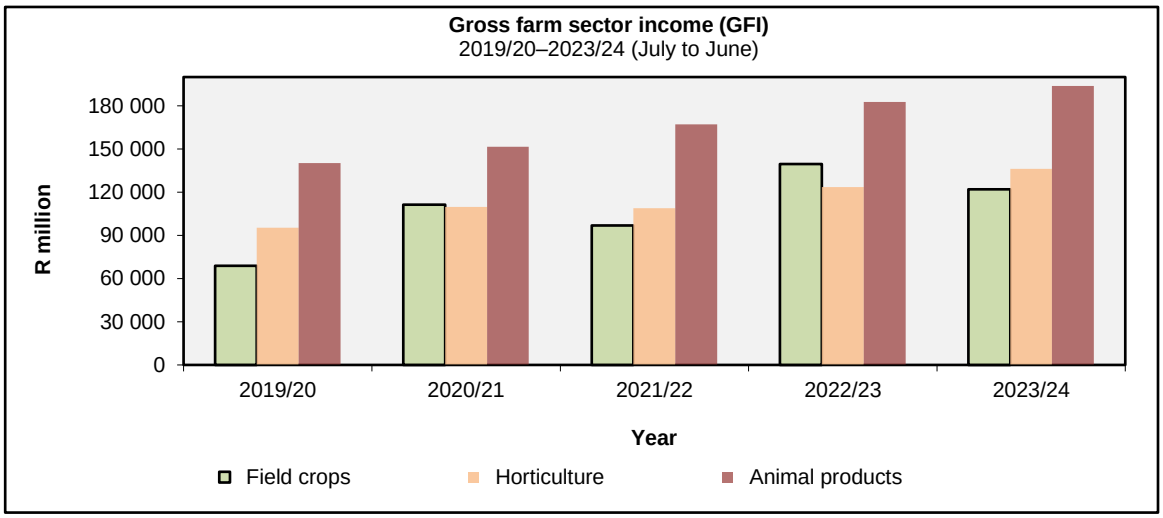
The *total gross value of agricultural production* (total production during the production season valued at the average basic prices received by producers) for 2023/24 is estimated at R448 399 million, compared to R425807 million the previous year—an increase of 5,3%. This increase can mainly be attributed to the increase in the value of horticultural and animal products by 12,4% and 6,1%, respectively.



The gross value of animal products contributed 43,2% to the total gross value of agricultural production, horticultural products 30,3% and field crops 26,5%. The poultry meat industry made the largest contribution with 15,4%, followed by maize 12,9% and cattle and calves slaughtered 10,4%.

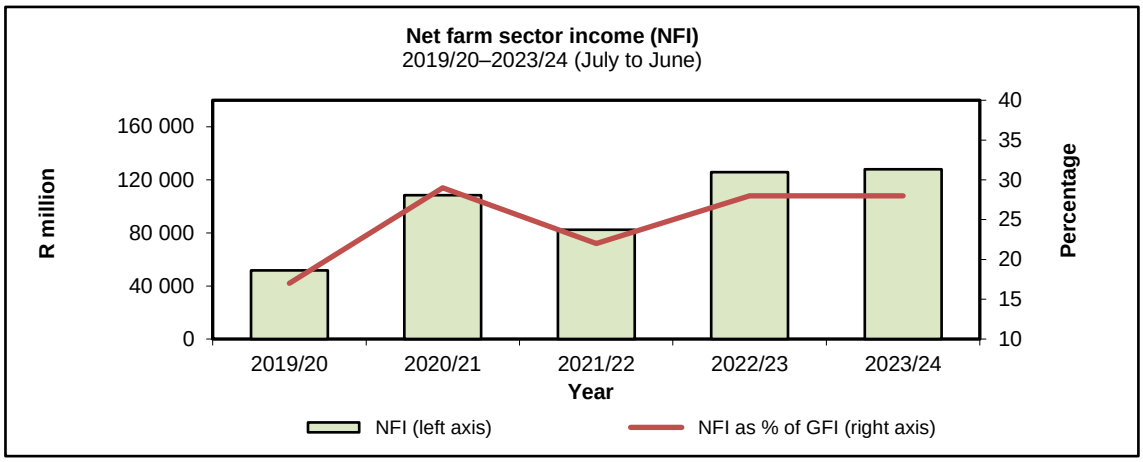
Farming income

The *gross income of producers* (the value of sales and production for other uses, plus the value of changes in inventories) decreased by 1,4% to R452100 million for the year ended 30 June 2024, from R445 915 million the previous year, which was due to the decreased incomes from animal and horticultural products.

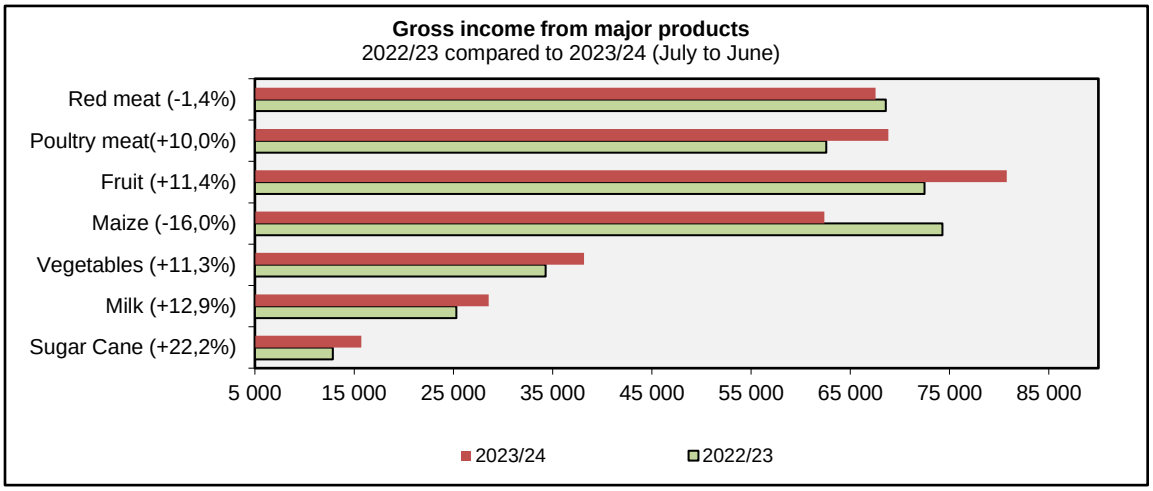


The *gross income from field crops* decreased by 12,7% to R121 952 million for the year ended June 2024, compared to R139 651 million of the previous period. This was mainly due to the decrease in income from soya beans (26,7%), maize (16,0%), wheat (15,7%), groundnuts (14,1%), canola (10,3%) and sunflower seed (9,5%). Income from sugar cane and dry beans increased by 22,2% and 21,8%, respectively.

The *gross income from horticultural products* increased by 10,3% to R136 280 million for the year ended June 2024, compared to R123 542 million the previous period. This can be attributed to the increase in income from citrus fruit by 14,0%, vegetables by 11,3%, deciduous and other fruit by 6,2% and subtropical fruit by 4,8%. The income derived from viticulture decreased by 1,6%.



The *gross income from animal products* increased by 6,1% and amounted to R193 869 million for the year ended June 2024, compared to R182 722 million the previous period. This was due to the increase in income from eggs by 19,0%, milk (12,9%) and poultry meat (10,0%). The income received from sheep slaughtered decreased by 6,0% and cattle and calves slaughtered by 3,2%.

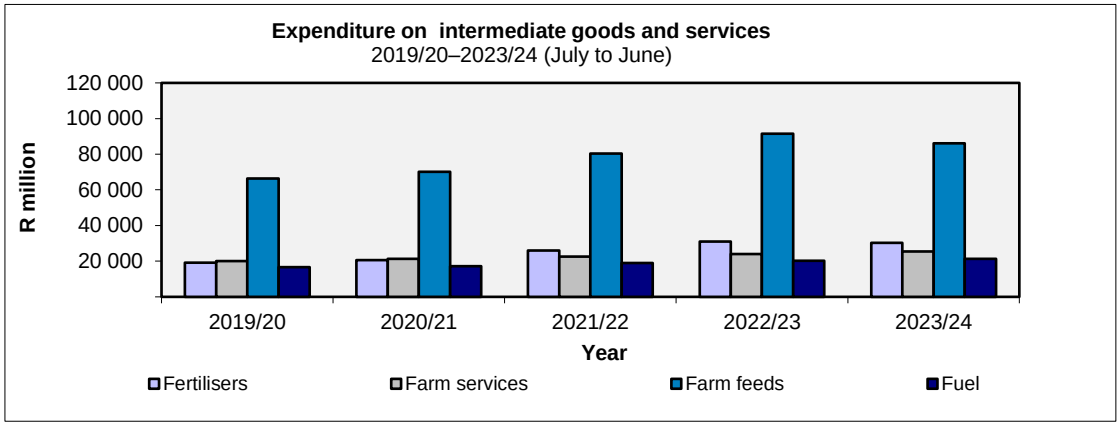


The *net farm income* (after the deduction of all production expenditure, excluding expenditure on fixed assets and capital goods) increased by 1,8% and amounted to R128 025 million for the period ended on 30 June 2024. Payments for salaries and wages, which represented 16,8% of the total farming costs, amounted to R55 672 million. Interest paid by farmers to banks and other financiers during the 12 months up to 30 June 2024 is estimated at R16 445 million, or 5,0% of the total farming costs.

Expenditure on intermediate goods and services

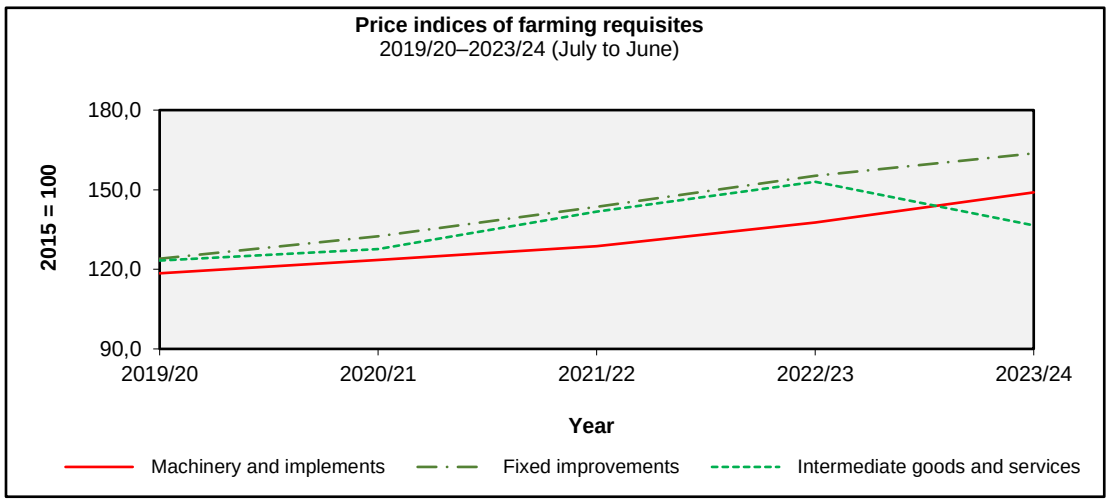
Intermediate expenditure refers to the value of goods and services that were purchased for consumption as inputs during the production process.

Expenditure on intermediate goods and services increased by 1,2% and estimated at R249 664 million. This was due to the increases in expenditure on seed and plants and building and fencing material by 10,0% each, animal health and crop protection by 8,8%, maintenance and repairs of machinery and implements by 8,0%, packing material by 7,9%, farm services by 6,0% and fuel by 5,4%. The expenditure on farm feed and fertilisers decreased by 6,0% and 2,6%, respectively.



Farm feeds had the largest share of 34,5% as an expenditure item, followed by fertilisers (12,1%), farm services (10,2%), fuel (8,6%), maintenance and repairs of machinery and implements and seed and plants (7,0%) each, building and fencing material (4,3%), animal health and crop protection (4,2%) and packing material (4,0%). **Prices of farming requisites**

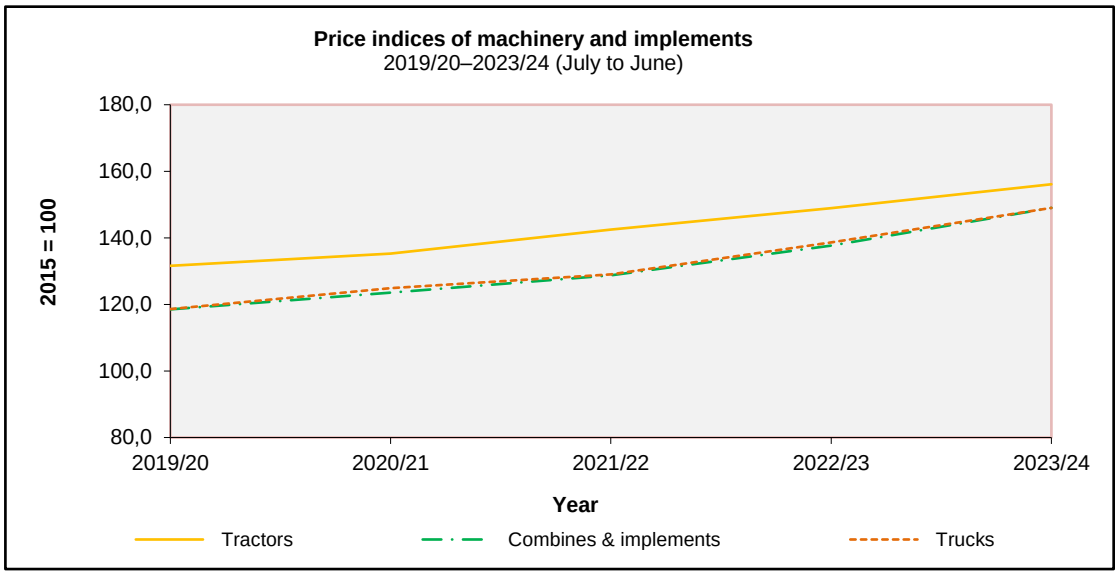
The prices paid for farming requisites, including machinery and implements, material for fixed improvements as well as intermediate goods and services showed a decrease of 7,9% for the period ended under review, compared to the increase of 7,9% the previous period. This was largely influenced by the decrease in prices of animal health and crop protection by 21,6%, fertilisers by 10,0% and feeds by 4,4%. The prices paid for trucks increased by 7,5%, building material (5,7%), packaging material (5,2%), fencing material (5,0%), tractors (4,8%), seeds (4,1%) and maintenance and repairs of machinery and implements (3,1%).



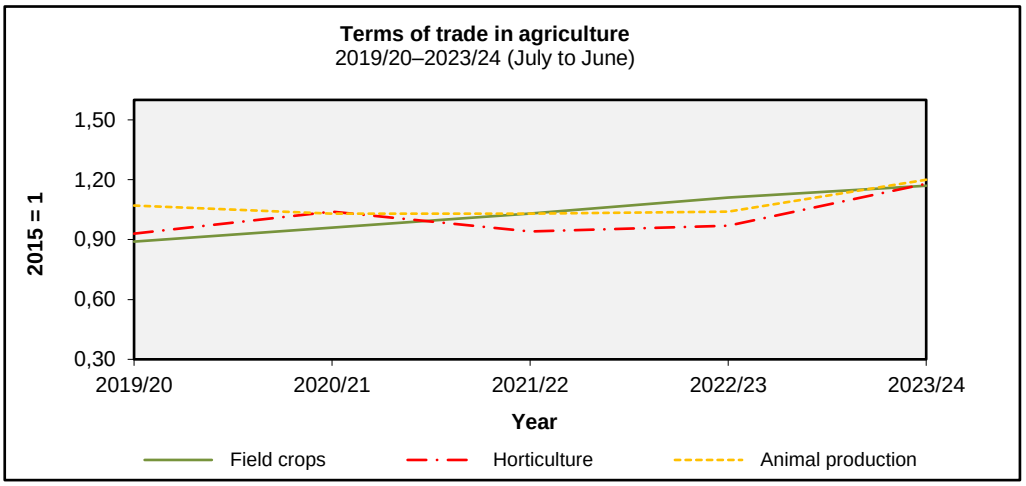
The combined price index of machinery and implements increased by 7,9% and materials for fixed improvements by 5,4% while that of intermediate goods and services decreased by 10,7%.

Domestic terms of trade in agriculture (2015 = 1)

The terms of trade indicate the extent to which producer prices received by farmers kept pace with the prices paid for farming requisites.



The domestic terms of trade increased by 15,5% from 1,03 to 1,19 owing to better prices that were received by farmers for their agricultural products. The terms of trade for field crops increased by 6,2% (from 1,11 to 1,17), horticultural products by 21,4% (from 0,97 to 1,18) and animal products by 15,1% (from 1,04 to 1,20).



Contribution of agriculture to value added at basic prices

Value added is the value of total output less the value of intermediate consumption during the production period.

The summary below shows the overall contribution of the agricultural sector to South Africa's economy. The contribution of agriculture to value added for the year ended 31 December 2024 is estimated at R156 234 million, which represents 2,5% of the total value added to the economy.

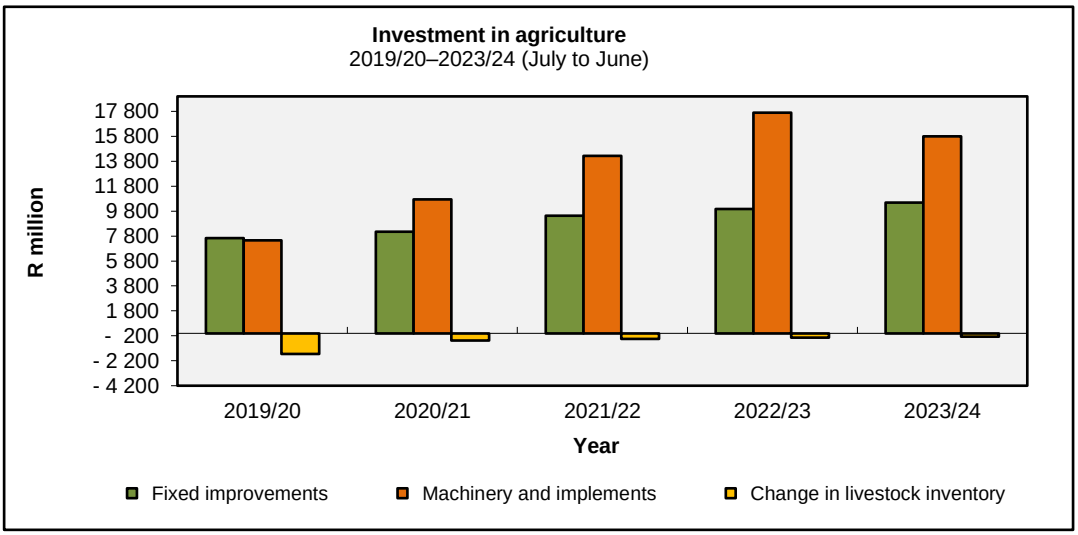
Year	Total value added R million	Contribution of agriculture to value added R million	Contribution of agriculture as percentage of total value added %
2009	2 564 505	56 990	2,2
2010	2 801 585	54 745	2,0
2011	3 035 118	57 801	1,9
2012	3 236 488	59 923	1,9
2013	3 502 361	63 361	1,8
2014	3 738 791	74 694	2,0
2015	3 981 758	83 946	2,1
2016	4 288 841	97 669	2,3
2017	4 592 450	107 644	2,3
2018	4 829 603	103 059	2,1
2019	5 058 166	93 253	1,8
2020	5 035 875	121 928	2,4
2021	5 603 770	131 548	2,3
2022	5 983 460	153 305	2,6
2023	6 310 829	156 234	2,5

Capital assets and investment in agriculture

The value of capital assets in agriculture showed an increase of R54 132 million (8,2%) to R716 468 million for the period ended June 2024, compared to R662 336 million the previous corresponding period.

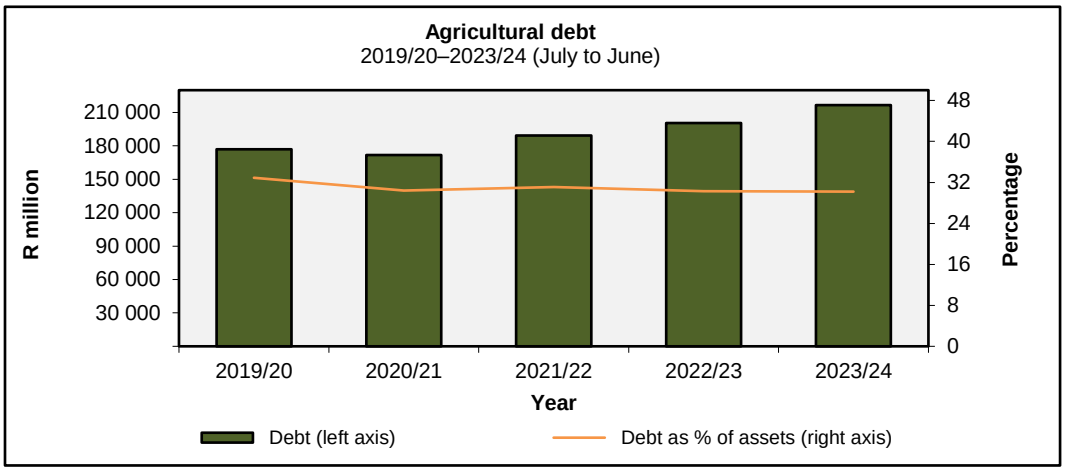
The proportion of land and fixed improvements to the total value of capital assets was R450 980 (62,9%), livestock (R132 812 million or 18,5%) and machinery and implements (R132 677 million or 18,5%).

The gross investment in machinery and implements and vehicles decreased by 8,8% (R18 074 million) for the period ended June 2024. Transport vehicles increased by 6,8% (R2 276 million) and machinery and implements decreased by 10,7% (R15 799 million). Fixed improvements increased by 5,1% (R10 475 million). The livestock inventory was estimated at 22,3% (R78 million) more than in the previous period.



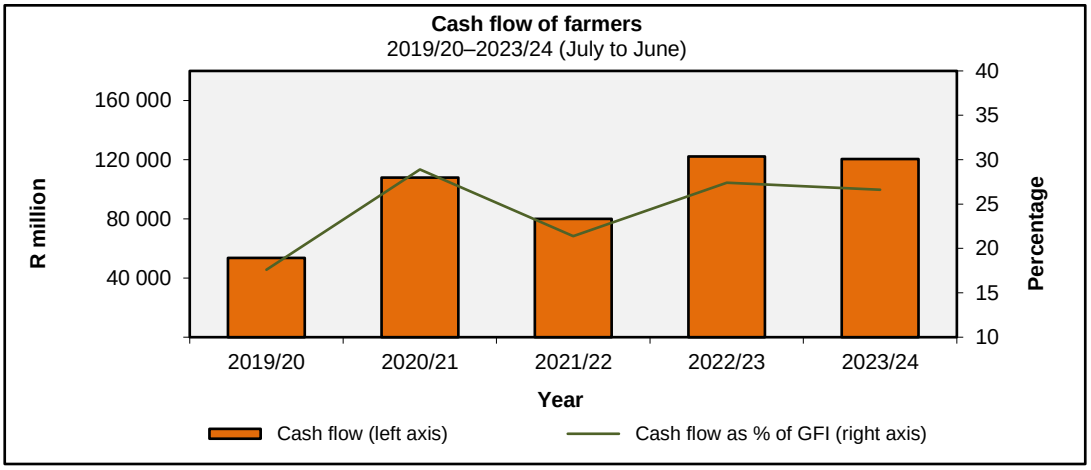
Farming debt

The total farming debt has increased by 8,0% and is estimated at R216 653 million for the year ended June 2024, compared to R200 555 million at the end of June 2023.



Cash flow of farmers

The farmers' cash flow showed a marginal decrease of 1,4% and estimated at R120 443 million in 2023/24, as opposed to R122 158 million in 2022/23. This decrease was largely owing to increased factors of production.



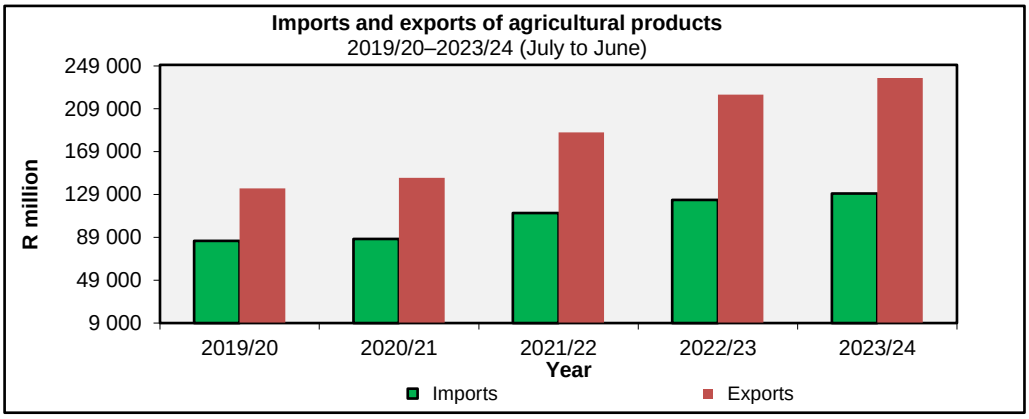
Consumer prices

The consumer prices of all agricultural products increased by 5,3% in 2023/24, as compared to an increase of 7,1% in 2022/23. The consumer prices of milk, eggs and cheese increased by 11,3%, grain products by 7,3%, food by 6,9%, non-food by 4,9% and meat by 2,5%.

The consumer prices of sugar increased by 16,3%, vegetables (13,2%), coffee and tea (11,0%), other food (9,9%), fruit (6,6%) and fish (5,9%). The consumer prices of fats and oils decreased by 6,2%.

Imports and exports of agricultural products

The estimated value of imports for 2023/24 amounted to R129 818 million, an increase of 4,7% from R124 036 million in 2022/23. The value of exports increased by 7,0%, from R222 217 million in 2022/23 to R237 841 million in 2023/24.



According to the 2023/24 export values, oranges (R14 388 million), maize (R14 160 million), grapes (R12 193 million), apples (R10 524 million) and wine (R10 210 million) were the most important agricultural export products. Milled rice (R12 362 million), wheat and meslin (R11 593 million), palm oil (R8 239 million), sugar cane (R3 575 million) and sunflower seeds (R3 547 million) accounted for the highest imports in terms of value.

During 2023/24, the Netherlands, with exports to the value of R24 506 million, the United Kingdom (R16 757 million), Zimbabwe (R14 907 million), China (R13 817 million) and Botswana (R13 553 million) were the five largest trading partners of South Africa in terms of export destinations for agricultural products.

The five largest trading partners for South Africa's imported agricultural products during 2023/24 were Thailand (R9 720 million), China (R8 172 million), Eswatini (R7 568 million), Brazil (R7 472 million) and Indonesia (R7 282 million).

Branches of the industry

FIELD CROP HUSBANDRY

Maize

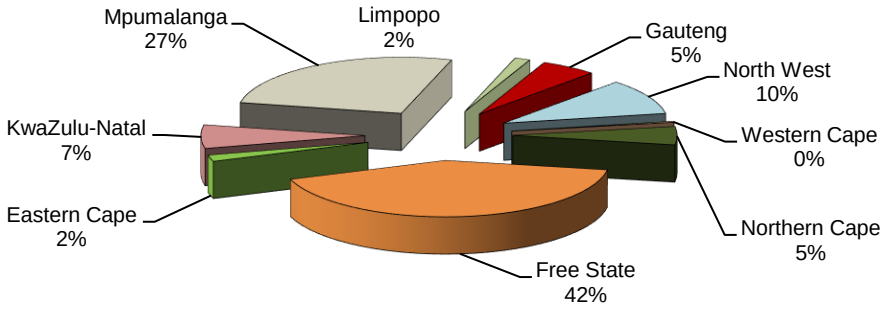
Maize is the most important grain crop in South Africa, being both the major feed grain and the staple food of the majority of the South African population. About 47,5% of maize produced in South Africa is white and the remaining 52,5% is yellow maize (2024). White maize is primarily used for human consumption, while yellow maize is mostly used for animal feed production.

The gross value of agricultural production is determined by the quantity produced and prices received by producers.

The largest contributor towards the gross value of field crops for 2023/24 is maize (47,5%), followed by soya beans (12,8%), wheat (9,6%), sugar cane (13,8%) and sunflower seed (4,9%). The gross value of maize for 2023/24 amounts to R55 249 million, which is 2,8% or R1 576 million less than the R56 826 million for 2022/23.

The contribution by provinces to maize production during the 2023/24 production season is depicted in the following figure.

Distribution of the maize crop
2023/24



White maize is generally produced in the western parts of the maize belt, while yellow maize is planted in the eastern parts.

The three main white maize-growing provinces in South Africa, namely, Free State, Mpumalanga and North West, produced about 88% of the white maize harvest in 2024, whereas the two main yellow maize-growing provinces, namely, Free State and Mpumalanga, produced about 66% of the yellow maize harvest.

Maize is planted during late spring/early summer, with optimal planting times in November and December. However, planting can start as early as October and extend to January. In a particular season, the rainfall pattern and other weather conditions determine the planting period as well as the length of the growing season. Most of the maize is harvested from late May up to the end of August.

The present ratio of areas planted is 59,0% white maize to 41,0% yellow maize. An estimated 4,0% of the area planted to white maize is under irrigation and 96,0% is dryland, while the estimate for yellow maize is 16,0% under irrigation and 84,0% is dryland.

About 85,0% of South Africa's maize production is grown with GM seeds.

Area planted and production

The 2023/24 summer crop season started favourably, with excellent rains in December and January that allowed most crops to be planted within the optimal planting window. Crop conditions were favourable in early February, but a three-week long dry spell (due to the El Niño weather phenomenon) from mid-February to early March occurred during the early grain filling stages, which is a critical stage in which plants need more moisture. Major damage has been caused to the crops since then and production prospects for the season were reduced.

The estimated area that South African commercial producers planted to maize during the 2023/24 season is 2,636 million ha. This is 1,9% or 50 150 ha more than the 2,586 million ha planted the previous season and 2,4% or 61 089 ha more than the five-year average of 2,575 million ha planted up to 2022/23.

Commercial white and yellow maize plantings for 2023/24 were 1 554 750 ha and 1 081 500 ha, respectively. This represents an increase of 2,2% for white maize and an increase of 1,6% for yellow maize.

The commercial maize crop for the 2023/24 production season is estimated to be 12,801 million tons, with an estimated yield of 4,86 t/ha. The production represents a decrease of 22,1% from the previous season (2022/23), which was estimated at 16,430 million tons.

The production estimate for white maize is 6,084 million tons, which is 28,5% or 2,421 million tons less than the 8,505 million tons of 2023 and 22,1% or 1,725 million tons less than the average of the five years (7,806 million tons) up to 2023. The estimated yield for white maize is 3,91 t/ha, compared to 5,59 t/ha the previous season.

In the case of yellow maize, the production estimate for 2024 is 6,717 million tons, which is 15,2% or 1,208 million tons less than the 7,925 million tons the previous season and 6,0% or 431 550 tons less than the five-year average (7,148 million tons) up to 2023. The estimated yield for yellow maize was 6,21 t/ha, compared to 7,44 t/ha in 2023.

For the 2023/24 season, 97,5% of the deliveries of white maize were grade WM1, compared to 96,3% of the 2022/23 crop and 89,5% of the yellow maize deliveries were grade YM1, compared to 97,1% of the 2022/23 crop.

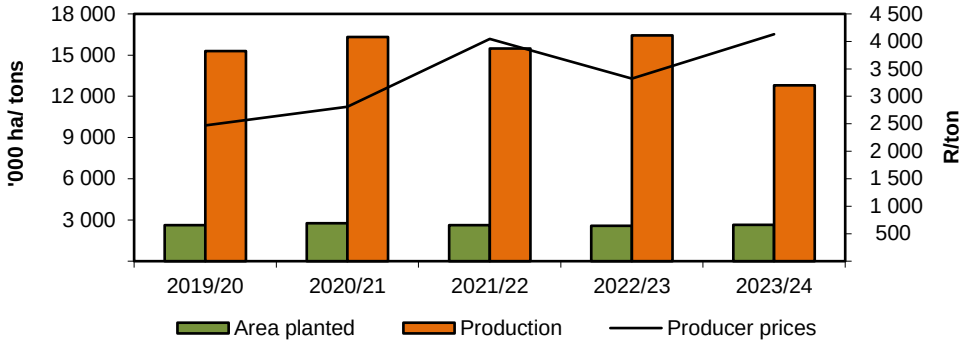
Plantings, production and yields of commercial maize from 2019/20 to 2023/24 are as follows:

Season	**2019/20**	**2020/21**	**2021/22**	**2022/23**	**2023/24**
Plantings (ha)	2 610 800	2 755 400	2 623 000	2 586 100	2 636 250
Production (t)	15 300 000	16 315 000	15 470 000	16 430 000	12 801 200
Yield (t/ha)	5,86	5,92	5,90	6,35	4,86

The estimated yield for maize is 4,86 t/ha for 2023/24, which is 23,5% or 1,49 t/ha less than the 6,35 t/ha the previous season. This is the lowest yield since 2015/16 when the maize yield was 4,00 t/ha. The lower yield this season is largely a consequence of the mid-summer drought in February and March, undermining the crop yield potential in various regions.

The area planted, production and producer prices of maize are depicted in the following graph:

Maize: Area planted, production and producer prices
2019/20–2023/24



In South Africa, the breadbasket of the southern African region, the maize sector comprises both commercial and non-commercial farmers; the latter being mostly in Eastern Cape, Limpopo, Mpumalanga and northern KwaZulu-Natal.

The area planted to maize by the non-commercial sector during 2023/24 is estimated at 347 000 ha, which comprises 267 570 ha of white maize and 79 430 ha of yellow maize. Production by the non-commercial sector is estimated at 575 000 tons: 407 500 tons of white maize and 167 500 tons of yellow maize. Maize grown by this sector is mainly for own use and contributes only approximately 4,3% to total production.

Prices

Since the deregulation of the South African agricultural market in 1996, the maize market has essentially been an open market in which a number of basic factors play a role in determining prices. These factors include:

- International maize prices;
- Exchange rates;
- Local production (influenced by weather conditions and area planted);
- Local consumption;
- Production levels in the Southern African Development Community region (South Africa is usually the main source of white maize for these countries in times of shortage); and
- Stock levels (both domestic and international).

Based on domestic stock levels, the domestic prices of maize fluctuate within a band that is determined by world prices, the exchange rate and local maize production. Because of the erratic weather conditions in the country, substantial variations in local production occur.

During periods of shortages, the rand price of maize tends to increase towards import parity, which is the international maize price *plus* transport and other costs, multiplied by the exchange rate. During surplus periods, the rand price tends to move towards export parity, which is the price of maize on the international market *minus* transport and other costs, multiplied by the exchange rate.

Currently, the prices of maize differ from one area to another and can fluctuate daily. Producers can manage their price risk by negotiating spot, contract or futures prices on SAFEX, based on market conditions.

The average producer price of maize increased by 24,2%, from R3 324,30/t in 2022/23 to R4 130,42/t in 2023/24, mostly because maize prices, especially white maize prices, are higher due to *inter* alia potentially tighter supplies later in the season and in the first quarter of 2025, as well as the relatively stronger exchange rate.

The average producer prices of maize from 2019/20 to 2023/24 are as follows:

Season	**2019/20**	**2020/21**	**2021/22**	**2022/23**	**2023/24**
	R/ton				
Producer price	2 470,58	2 812,08	4 047,25	3 324,30	4 130,42

The South African maize market has matured considerably since the deregulation of marketing. Producers, traders and other intermediaries interact freely in the marketing of maize.

Supply and Demand

Most of the maize produced in South Africa is consumed locally; as a result, the domestic market is very important to the industry.

Considering the 2024/25 marketing season (May to April), the total supply of maize is projected at 15,021 million tons (7,272 million tons white and 7,749 million tons yellow). This includes an opening stock (on 1 May 2024) of 2,405 million tons (1,347 million tons white and 1,058 million tons yellow) and local commercial deliveries of 12,191 million tons (5,894 million tons white and 6,297 million tons yellow). Maize imports of 440 000 tons (no white maize and 440 000 tons of yellow maize) is projected for the 2024/25 season.

The total demand, local and exports, for maize is projected at 14,066 million tons (6,905 million tons of white and 7,161 million tons of yellow maize). The total local demand is projected at 11,661 million tons (5,315 million tons white and 6,346 million tons yellow). A projected export quantity of 2,405 million tons (1,590 million tons white and 815 000 tons yellow) is expected for the 2024/25 marketing season. The projected closing stock level by 30 April 2025 is estimated at 955 282 tons (366 634 tons white and 588 648 tons yellow). Stock levels for maize in South Africa are tight, given the poor harvest.

Trade balance

In the case of a product such as maize, millers (who are the main buyers of the maize crop) have the option of importing maize instead of buying locally produced maize. In a deregulated market, the decision whether to buy from domestic or foreign sources is influenced by, among other factors, transport costs, price and quality. When the product is imported, the exchange rate plays an important role in the actual rand price.

Depreciation in the value of the rand against relevant foreign currencies makes import products, such as maize, wheat and oilseeds more expensive in rand terms, thereby providing some protection for South African farmers and an incentive to increase production in the longer term. However, if South African producers are unable to meet the needs of the processors, or if processors are uncertain about local supplies, foreign sources can be considered.

South African producers, on the other hand, will consider the export market if local processors are unwilling to pay the prevailing local market price. In this manner, the market sets “natural” floor and ceiling prices, i.e., a price band within which such products trade. The price-setting mechanism for these crops is the JSE Security Exchange of South Africa’s Agricultural Products Division.

South Africa will remain a net exporter of maize for the 2024/25 marketing season as commercial production slightly exceeds local consumption. Up to 4 October 2024, about 971 677 tons of maize, of which 638 611 tons were white maize and 333 066 tons yellow maize, had been exported since May—approximately 51,1% of the estimated total maize exports of 1,900 million tons.

For the 2024/25 marketing season, Zimbabwe (54,3%, or 346 840 tons), Botswana (15,0%, or 95 781 tons), Namibia (14,2%, or 90 458 tons) and Lesotho (7,5%, or 47 712 tons) were the major markets for South Africa’s white maize exports.

The bulk of the yellow maize exports for the current season up to 4 October 2024 was characterised by exports to Zimbabwe (55,8%, or 185 881 tons), Botswana (14,0%, or 46 767 tons), Eswatini (11,6%, or 38 792 tons), Mozambique (8,6%, or 28 498 tons) and Namibia (8,1%, or 27 043 tons), amongst others.

Normally, the window of opportunity for exports of domestic maize lasts only until the end of October, when the harvesting of the US crop and US exports start.

The following graph shows the imports of maize to and exports from South Africa during the past five marketing seasons (May to April).

Maize tariff

The import tariff on maize is another domestic factor that could have an impact on the local price of maize. The import tariff on maize, as published in the *Government Gazette* of 8 December 2006, is zero.

World maize situation

According to the October 2024 report of the United States Foreign Agricultural Services, world maize production in 2024/25 (October to September) was forecast at 1,217 billion tons, which is 0,7% or 8,7 million tons less than the 1,226 billion tons produced during 2023/24. The US contributed 31,7% (386,2 million tons), China 24,0% (292,0 million tons), Brazil 10,4% (127,0 million tons) and the European Union 4,8% (59,0 million

tons) to world production. The remaining 29,1% is made up by Argentina, Ukraine, Mexico, India and South Africa, among others.

Global consumption in 2024/25 was expected to be 1,218 billion tons—650 000 tons more than in the previous year. Global ending stocks at the end of August 2025 were expected to be 308,4 million tons, which is 1,3 million tons or 0,4% less than in the previous year.

Marketing, information and research

No statutory levies are applicable, and the marketing of maize is free from statutory intervention.

The information function is performed by the Department of Agriculture, Land Reform and Rural Development through the Directorate: Statistics and Economic Analysis and Grain South Africa, which promote the interests of maize producers and SAGIS, a section 21 company funded by, among others, the maize industry.

Research is financed with income from the Maize Trust and performed by the Agricultural Research Council, the Council for Scientific and Industrial Research and other organisations.

Sorghum

Plantings and production

Sorghum is an indigenous crop to Africa and regarded as the fifth most important cereal in the world. There are two types of sorghum, namely, bitter and sweet sorghum cultivars. Preference is given to the sweet cultivars. Bitter sorghum is planted in areas where birds are a problem because it contains tannin, which leaves a bitter taste and consequently birds tend to avoid feeding on it.

Sorghum is mainly cultivated in low and erratic rainfall areas, especially in shallow and heavy clay soils. Sorghum is planted mainly between mid-October and mid-December. The rainfall pattern and other weather conditions of the particular season can determine the planting period in addition to the length of the growing season to a large extent.

During the last production season, an estimated 42 100 ha were planted to sorghum for commercial use, representing an increase of 23,8% from the 34 000 ha planted for the 2023 season.

Sorghum for commercial purposes was produced mainly in Mpumalanga (37,2%), followed by Limpopo (36,6%), Free State (19,2%) and North West (5,8%). For the past five seasons until 2023, South Africa produced an average of 139 500 tons of sorghum per annum, which is relatively small compared to domestic maize and wheat production.

During the 2024 production season, sorghum contributed only approximately 0,4% to the gross value of field crops. The estimated average annual gross value of sorghum for the five years up to 2023/24 amounts to R516 million.

South Africa’s 2023/24 planting season was characterised by above-average rain in December and January. Crop conditions were therefore favourable in early February; however, a three-week long dry spell, together with a persistent heatwave associated with the El Niño cycle, occurred from mid-February to early March, during the early grain-filling stage of the crops. Production prospects have therefore been adversely affected for the season.

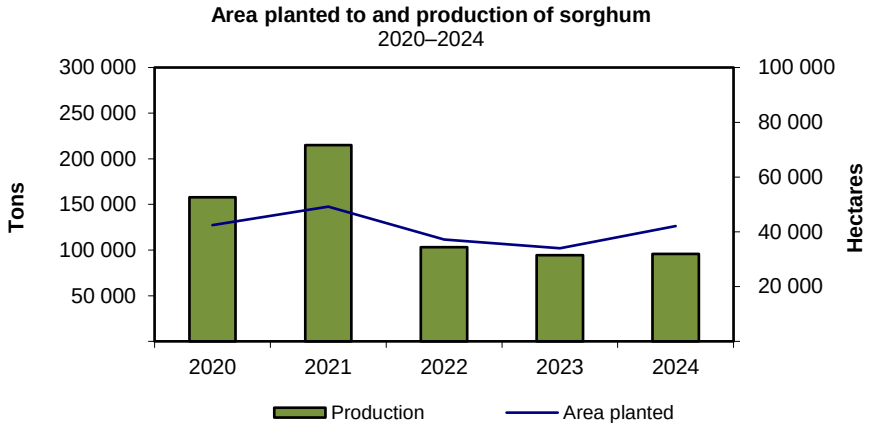
The commercial sorghum crop for the 2024 season is estimated at 95 830 tons, which is 1,6% more than the 94 360 tons of the previous season and 31,3% less than the five-year average production of 139 500 tons up to 2023. The yield for 2024 is estimated at 2,28 t/ha, which is 29,4% less than the five-year average yield of 3,23 t/ha up to 2023.

Plantings, production and the yields of sorghum from 2020 to 2024 are as follows:

Season	2020	2021	2022	2023	2024
Plantings (ha)	42 500	49 200	37 200	34 000	42 100
Production (t)	158 000	215 000	103 140	94 360	95 830
Yield (t/ha)	3,72	4,37	2,77	2,78	2,28

Over the past decade, sorghum production in South Africa decreased dramatically as producers preferred to plant more profitable crops, like maize and oilseeds.

The following graph shows the area planted to and the production of sorghum in South Africa.



The non-commercial agricultural sector contributed approximately 14 374 tons, which was about 13,0% of the total sorghum production in South Africa during 2024.

Consumption

Sorghum, like other grains, has two basic markets that it serves, i.e., the human component and the animal feed component. Sorghum is consumed mainly in the human food market and, as in the case of maize, consumers tend to replace sorghum-based products with preferred products as the household income increases.

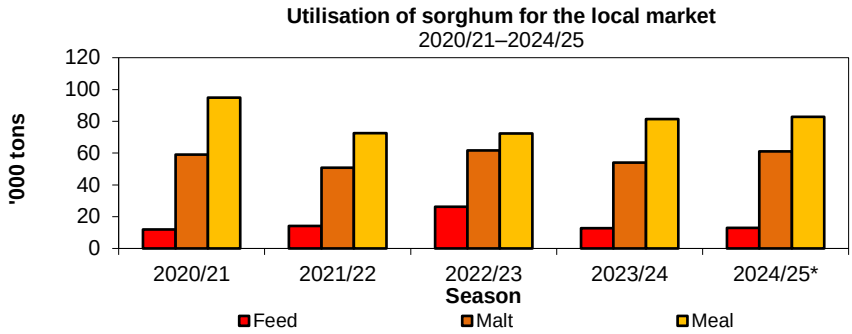
Expectations are that a total of 93 830 tons of sorghum will be available for local consumption during the 2024/25 marketing season (March to February), compared to 84 000 tons the previous season. The total domestic supply of 250 605 tons estimated for this season comprises of carry-over stocks as of 1 March 2024

amounting to 54 775 tons, plus producer deliveries of 93 830 tons at commercial structures, imports of 100 200 tons and a surplus of 1 800 tons.

The projected commercial utilisation of sorghum for the 2024/25 marketing season is approximately 156 715 tons, of which 143 700 tons are for human consumption (malt, meal and other uses) and 13 015 tons are for animal feed (poultry, pet, pigeon and ostrich feeds). Other uses (released to end-consumers, withdrawn by producers, etc.) amounts to 1 800 tons. Projected exports during the 2023/24 marketing season are 20 200 tons.

Considering the above, carry-out stocks on 28 February 2025 are expected to be about 71 890 tons.

The following graph depicts the utilisation of sorghum in South Africa (marketing seasons):



**Projection*

Producer prices

Local producer prices of sorghum increased by 3,7%, from R3 625,44/t in 2023 to R3 761,15/t in the 2024 season.

Season	2020	2021	2022	2023	2024
	R/t				
Producer price	2 639,36	3 337,55	3 889,48	3 625,44	3 761,15

Imports and exports

During the 2024 season, up to 31 August 2024, South Africa imported mainly from Brazil.

When it comes to exports, South Africa exports small quantities of sorghum to key markets in southern Africa, i.e., Botswana and Eswatini.

Imports and exports of sorghum from 2020 to 2024 are as follows:

Season	2020	2021	2022	2023	2024*
	Tons				
Imports	6 546	4 147	768	83 049	100 200
Exports	5 380	9 058	10 841	12 395	20 200

**Projection*

Projected exports of sorghum for 2024 is 20 200 tons, which is 63,0% more than the 12 395 tons of 2023. In 2024, it is expected that 100 200 tons of sorghum will be imported.

Wheat

In terms of value of production, wheat is the fourth most important field crop produced in South Africa. In the 2023/24 season, this crop contributed approximately 9% to the gross value of field crops. The annual gross value of wheat amounts to R11 151 million, compared to R55 249 million for maize, which is the most important field crop.

Wheat is mainly planted between mid-April and mid-June in the winter rainfall area and between mid-May and the end of July in the summer rainfall area. The crop is harvested from November to January. Most of the wheat produced in South Africa is bread wheat, with small quantities of durum wheat being produced in certain areas.

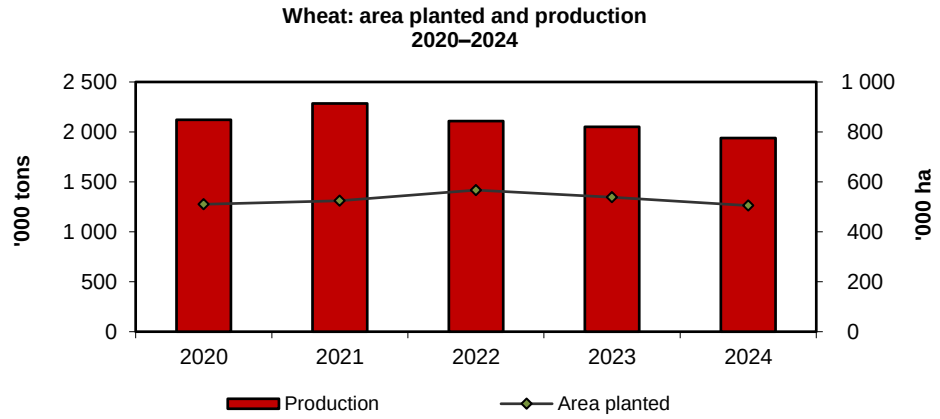
Wheat is generally classed as “hard” or “soft”. Hard wheat tends to have higher protein content than soft wheat and is used mainly for bread. Soft wheat, on the other hand, is more suitable for confectionery.

Areas planted and production

The estimated area planted to wheat for the 2024 season is 505 300 ha, which is 6,1% less than the 537 950 ha of the previous season. The area planted to wheat in Western Cape is 368 000 ha (73%), which is 3 000 ha more than the 365 000 ha planted in the previous season. In Free State, the area planted is 49 000 ha (10%), which is 23 000 ha less than the previous seasons’ area of 72 000 ha. The decrease in plantings can be attributed to the relatively low producer prices of wheat compared to the high input costs (no longer profitable), problems farmers are experiencing with the grading system, the calculation of the transport differential, as well as the impact of weather conditions in some areas. Furthermore, the decrease in wheat plantings in Free State is mainly due to dryland producers who have moved from wheat plantings to the planting of summer crops, such as maize and soya beans.

For the 2024 production season, weather conditions across South Africa’s wheat growing areas were quite favourable. Western Cape, South Africa's main wheat producing province, had a challenging start to the season, with dry weather conditions in May and June, followed by excessive rainfall in July and August. Despite the difficult start, the outlook for the wheat remains positive.

The areas planted to, and production of wheat is depicted in the following graph:



Based on conditions prevailing towards the end of September 2024, the expected commercial wheat crop for 2024 was 1,939 million tons. The expected production in Western Cape was 1,104 million tons (57%), in Northern Cape 277 400 tons (14%) and in Free State 227 850 tons (12%). The expected average yield was 3,84 t/ha.

Plantings, production and yields from 2020 to 2024 are as follows:

Season	**2020**	**2021**	**2022**	**2023**	**2024**
Plantings (ha)	509 800	523 500	566 800	537 950	505 300
Production (t)	2 120 000	2 285 000	2 110 000	2 050 000	1 938 600
Yield (t/ha)	4,16	4,36	3,72	3,81	3,84

Consumption

According to the Supply and Demand Estimates Committee (S&DEC), a total of 4,473 million tons of wheat (commercial) were available for local consumption during the 2023/24 marketing season (October to September). This comprised carry-over stocks as of 1 October 2023 of 563 259 tons, producer deliveries of 2,010 million tons, a surplus of 0 tons and imports of approximately 1,900 million tons.

The total demand for wheat for the 2023/24 marketing season is estimated at approximately 3,732 million tons, of which 247 500 tons were exported. Carry-out stocks as of 30 September 2024 are estimated to be 741 459 tons.

For the 2024/25 marketing season, the total supply of wheat is forecasted at 4,550 million tons (expected producer deliveries of 1,901 million tons, together with the carry-over stocks of 741 459 tons, a surplus of 8 000 tons and expected imports of 1,900 million tons).

The demand for wheat (exports included) is estimated at 3,789 million tons. Carry-out stocks at the end of September 2025 are expected to amount to 760 959 tons.

Imports

South Africa, a net importer of wheat, relies on imports from Russian Federation, Australia, Lithuania and Poland, amongst other countries, to meet its domestic demand. It is expected that for the 2024/25 marketing season, 54% or 1,900 million tons of the wheat required for domestic consumption will have to be imported.

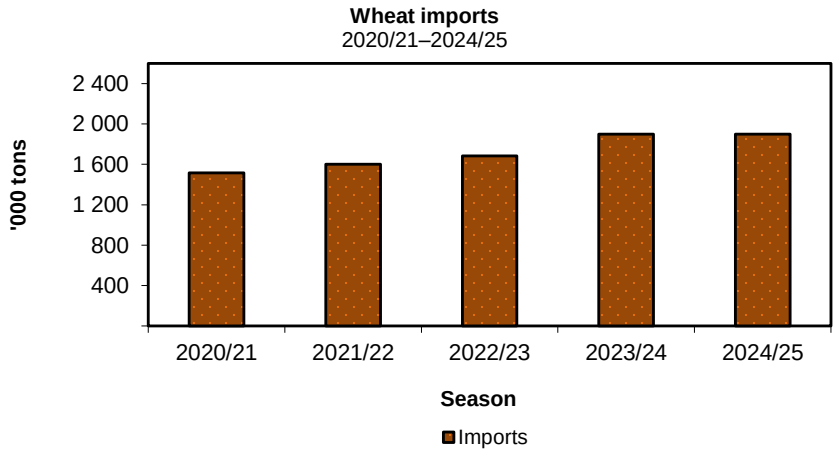
Wheat imports from 2020/21 to 2024/25 are as follows:

Season	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25**
	Tons				
Imports	1 516 995	1 601 299	1 684 356	1 900 000	1 900 000

Projection for the 2024/25 marketing season

Source: SAGIS

The following graph shows the imports of wheat during the past five seasons (October to September).



There are mainly two factors that affect local wheat prices—the value of the rand against the dollar and international prices. The average producer price of wheat is expected to decrease by 2,1%, from R5 415,70/ton in 2023/24 to R5 300,00/ton in 2024/25.

The average producer prices of wheat from 2020/21 to 2024/25 are as follows:

Season	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25**
	R/ton				
Producer price	4 864,03	5 193,31	6 333,49	5 415,70	5 300,00

Projection for the 2024/25 marketing season

Marketing

The South African wheat market was deregulated on 1 November 1997 and wheat can therefore be traded freely. The only government intervention in the market is the tariff on wheat imports. On 8 August 2024, a free wheat tariff was published in the *Government Gazette.*

World wheat situation

According to the September 2024 report of the United States Foreign Agricultural Services, the global wheat production in 2024/25 is projected at 796,9 million tons, up by 0,8% or 6,3 million tons from the 2023/24 record.

According to expectations, China would contribute 17,6% (140,0 million tons), the European Union 15,6% (124,0 million tons), India 14,3% (114,0 million tons) and Russia 10,4% (83,0 million tons) to world production during 2024/25. The balance of 42,1% is made up by the US, Canada, Australia and Pakistan, among others.

Global consumption is expected to be 804,9 million tons during 2024/25—6,0 million tons more than the previous year. Global ending stocks are expected to decline to 257,2 million tons by the end of June 2025, which is 8,0 million tons or 3,0% less than the previous year.

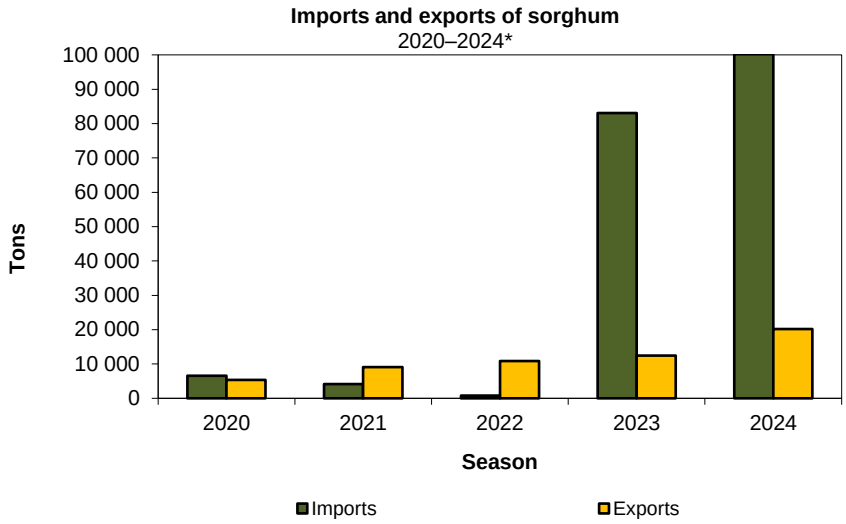
Research and information

The Winter Grains Trust is responsible for the allocation of funding and appraisal of relevant research projects in the winter grains industry. Since 1998, statutory levies on sales of winter cereals have been used to finance the Winter Grains Trust.

The ARC-Small Grain Institute in Bethlehem conducts research on wheat and other winter grains.

The South African Grain Information Service (SAGIS), a section 21 company funded by, among others, the wheat industry, administers the information function for the wheat industry.

Accurate crop forecasts and estimates also play an important role by providing up-to-date information upon which important decisions and measures can be based. The crop estimates are a result of the collated inputs of, and consensus reached by, the various members of the Crop Estimates Committee.



**Projection*

Per capita intake

Indigenous cereals such as sorghum make only a small contribution to the starch-rich staple food complex in South Africa. The average estimated annual per capita intake (2020 to 2024) remains dominated by maize (72 kg/capita) and wheat (47 kg/capita), followed by potatoes (34 kg/capita) and rice (16 kg/capita), while sorghum intake was significantly lower at a mere 1 kg/capita.

World sorghum situation

According to the FAS/USDA report released in October 2024, world production of sorghum increased by 7,5%, from 58,3 million tons in 2023 to 62,6 million tons in 2024. The contribution to world production by selected countries is as follows: the United States contributed 12,4% (7,7 million tons), Nigeria 11,5% (7,2 million tons), both Sudan and Brazil at 8,0% (5,0 million tons respectively), and Mexico at 7,2% (4,5 million tons). The balance of 52,9% was made up by other remaining countries.

Cooperation

The Sorghum Forum, consisting of all the participating parties in the sorghum industry (producers, traders, silo owners, processors, labour, consumers and the ARC), meets regularly to discuss various issues relevant to the industry.

The Sorghum Trust provides funding for research on sorghum, the maintenance and improvement of quality standards and the storing and updating of information required by the sorghum industry.

SAGIS, an independent section 21 company collects, collates and publishes market information on sorghum.

The Southern African Grain Laboratory, incorporated under Section 21 (Association Not for Gain), analyses the quality of grain.

The Crop Estimates Committee plays an important role in providing up-to-date market information on which important decisions and actions can be based.

On a national basis, the ARC is responsible for research and development in the agricultural sector.

Malting Barley

Plantings and production

Barley is one of the most important grain crops in South Africa, surpassed only by wheat and maize and is, following wheat, the most important small grain type.

The cultivation area for barley under dryland conditions is at present restricted to a very specific region, namely, the Southern Cape, which stretches from Bot River in the west to Heidelberg in the east. It would not be economically viable to cultivate barley on dryland in an area that does not receive 350 mm of well-distributed rainfall during the growing season (April to October). At present, five varieties are recommended for barley production in the Southern Cape, viz., SabbiErica, SabbiNemesia, Disa, Agulhas and Hessekwa.

The concentration of the production of a relatively minor commodity, for instance barley, in a specific area has various advantages, e.g., it facilitates transport, storage, control, extension and research, which also implies cost advantages.

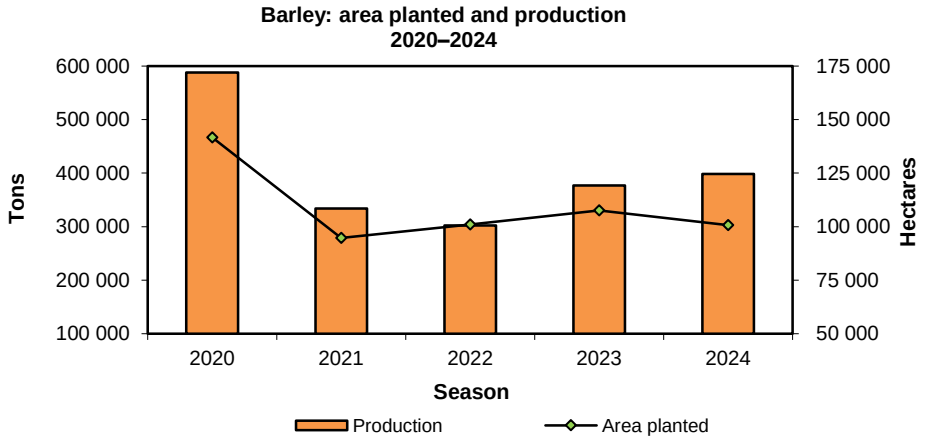
However, because of the risk of unpredictable weather conditions in the Southern Cape, barley production has also been introduced to the cooler central irrigation areas in Northern Cape. There are also farmers in other areas of South Africa, such as North West, Limpopo and Free State, who plant small quantities of barley under irrigation.

Barley under irrigation has a higher yield and is more stable than in the Southern Cape, where the crop is dependent on rainfall.

Barley is planted over a relatively short period of time (from three weeks in certain areas to five weeks in others). The earlier plantings generally have a higher yield potential. This results in greater yield increases with disease and pest control programmes in earlier plantings. Barley planted later than the optimum planting period is therefore at greater risk in terms of both yield and quality.

Barley is mainly used for the production of malt (for brewing beer), animal feed and pearl barley. However, the Crop Estimates Committee's barley estimates only involve barley, therefore excluding barley for animal feed.

The area planted to barley for the 2024 season is estimated at 100 700 ha. This is an increase of 6,9% or 6 900 ha from the plantings of 107 600 ha during 2023. It is also 12,7% or 14 696 ha less than the five-year average of 115 396 ha planted up to 2023. Of the 100 700 ha planted in 2024, 90 000 ha (89,4%) are in Western Cape, 7 000 ha (7,0%) are in Northern Cape, 1 600 ha (1,6%) are in Limpopo, 1 500 ha (1,5%) are in North West and only 600 ha (0,5%) are in Free State.



A total crop of 398 535 tons of barley is expected for the 2024 season. This is an increase of 5,7% more than the production of 377 000 tons in the previous season and 2,4% or 9 335 tons less than the average production of 389 200 tons per annum over the five years up to 2023. The expected average yield for 2024 is 3,9 t/ha.

Plantings, production and yield of barley from 2020 to 2024 are as follows*:*

Season	2020	2021	2022	2023	2024
Plantings (ha)	141 690	94 730	101 000	107 600	100 700
Production (t)	588 000	334 000	302 000	377 000	398 535
Yield (t/ha)	4,15	3,53	2,99	3,50	3,96

Consumption

The processing of barley into malt is done mainly in Caledon in the Southern Cape, but also in Alrode near Johannesburg. Malt barley is all about taste and is mainly used to flavour beer. It is also used around the world in many foods.

The total supply of barley for the 2023/24 marketing season (October to September) is estimated at 646 900 tons (imports included). Carry-over stocks as of 1 October 2023 amounted to 149 900 tons. Production for the 2023/24 season was 377 000 tons, while 120 000 tons were imported.

For the 2023/24 marketing season, the total demand for barley was estimated at 490 700 tons, including 40 000 tons of exports. Carry-out stocks of 30 September 2024 were 156 200 tons.

For the 2024/25 marketing season, the total supply of barley is expected to be 674 800 tons, comprising the expected crop of about 398 500 tons, carry-over stocks of 156 2000 tons and 120 000 tons of imports are expected. The domestic demand is estimated at 493 000 tons, including 40 000 tons of exports. Carry-out stocks at the end of September 2024 are expected to amount to 181 800 tons.

Producer prices and value of the crop

The average producer price of barley decreased by 24,8%, from R4 524,88 R/ton in 2022 to R3 402,88 R/ton in 2023.

The average producer prices of barley from 2019 to 2023 are estimated as follows:

Season	**2019**	**2020**	**2021**	**2022**	**2023**
	R/ton				
Producer price	3 039,82	2 515,69	2 795,48	4 524,88	3 402,88

The average annual gross value of barley for the past five years up to 2023/24 amounts to R1 222 million, compared to the R10 630 million of wheat and R53 338 million of maize.

Marketing

Barley is different from most, if not all, other agricultural commodities as there is only one major buyer in South Africa, namely, South African Breweries Maltings (SABM), which supplies its major shareholder, South African Breweries Limited (SAB) with malted barley. Barley producers have a guaranteed market (there is a written commitment to source locally) and fixed-price forward contracts. The malt barley industry is significant in South Africa's national economy, with barley playing a crucial role in the crop rotation systems used by farmers.

Imports

Variability in rainfall can cause wide fluctuations in barley quality and yields in South Africa. Whenever the local crop has fallen short of requirements, South Africa depends on imports from Australia, France and the Ukraine.

Barley and malt imports from 2018/19 to 2022/23 are as follows:

Season	2019/20	2020/21	2021/22	2022/23	2023/24
	Tons				
Imports					
Barley	44 837	0	0	75 000	120 000
Malt	62 437	126 752	150 386	207 849	915 513

Source: SAGIS; customs & excise

World barley situation

Global production in the 2023/24 marketing season is mainly driven by the larger crops in the European Union (47,86 million tons) and Russia (18,30 million tons).

Research and information

The ARC-Small Grain Institute (SGI) in Bethlehem and the South African Barley Breeding Institute (Sabbi) near Caledon conducts research on and breeding of barley in South Africa, which is financed by statutory levies on barley sales**.**

The ARC-SGI is one of the crop institutes of the ARC which has, under the Agricultural Research Act, 1990 (Act No. 86 of 1990), the mandate to perform research, development and transfer of technology within the RSA to the advantage of all agricultural and agriculture-related industries and therefore improve the quality of life of all South Africans.

On the other hand, Sabbi's Research and Development mission is to ensure sustainable barley production for the benefit of the SAB, SABM and the producer through innovative research and development. Producers need better quality, higher yields, and more resistant varieties in addition to increased knowledge of enhanced agricultural production practices in order to be more competitive with global competitors.

The SAGIS, a section 21 company funded by, among others, the barley industry, administers the information function for the barley industry.

Sunflower seed

Sunflower seed can be planted from the beginning of November to the end of December in the eastern parts of the production areas and up to the middle of January in the western parts. Sunflowers grow best when planted in midsummer to ensure that less moisture is lost from the soil during the crucial growing phases. Compared to other crops, sunflower performs well under dry conditions. This is probably the main reason for the crop's popularity in the marginal production areas of South Africa. A close link exists between the area planted to maize and the area planted to sunflower seed because farmers can easily switch to sunflower if the normal period for maize planting has passed.

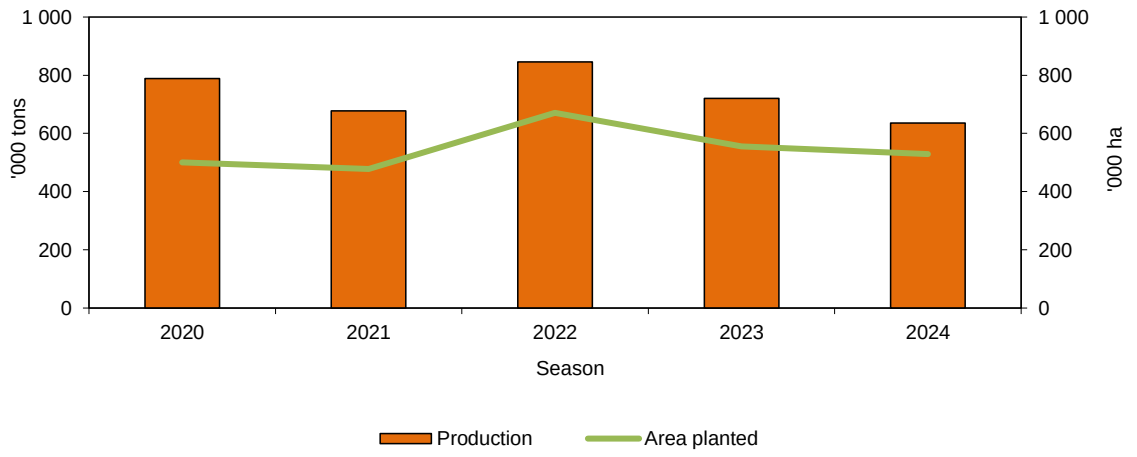
Plantings and production

During the 2024 production season, the bulk of the crop was produced in Free State (48,2%), North West (33,1%) and Limpopo (17,0%).

The contribution of sunflower seed to the gross value of field crops during the 2023/24 season is approximately 4,8%, compared to 48,6% of maize, the largest contributor to field crops. The average annual estimated gross value of sunflower seed from 2018/19 to 2022/23 amounts to R5 665 million compared to the R47 498 million of maize.

The annual plantings of sunflower show remarkable variation over the past two decades, varying from 316 350 ha planted in 2007, a high of 718 500 ha planted in 2016, and 529 000 ha in 2024. The area planted to sunflower seed for commercial use during the 2024 production season decreased by 4,8% to 529 000 ha, from an estimated 555 700 ha the previous season. This is also 2,8% less than the five-year average of 543 970 ha up to 2022/23. The decrease in the 2024 sunflower plantings can mainly be attributed to the increase in

Area planted to and production of commercial sunflower seed
2020–2024



soya bean and maize plantings due to favourable weather conditions during November and December 2023.

Commercial sunflower seed production during 2024 is approximately 635 750 tons, which is 11,7% less than the previous season (720 000 tons) and 14,3% less than the average of 742 010 tons for the previous five

years. The decrease in production is the result of a widespread El Niño-linked drought that caused crop failures, steep declines in yields and reductions in harvested areas. Rainfall deficits during February and March 2024, along with elevated temperatures, were a particularly damaging combination for summer grain crops and occurred at a critical growing stage, when crops were especially susceptible to water stress. The average yield for 2024 is approximately 1,20 t/ha, which is 7,7% less than 1,30 t/ha during the previous season and 11,8% less the five-year average of 1,36 t/ha up to 2023.

Non-commercial agriculture contributed an estimated 25 778 tons (3,8%) to the total sunflower seed production in South Africa during 2024.

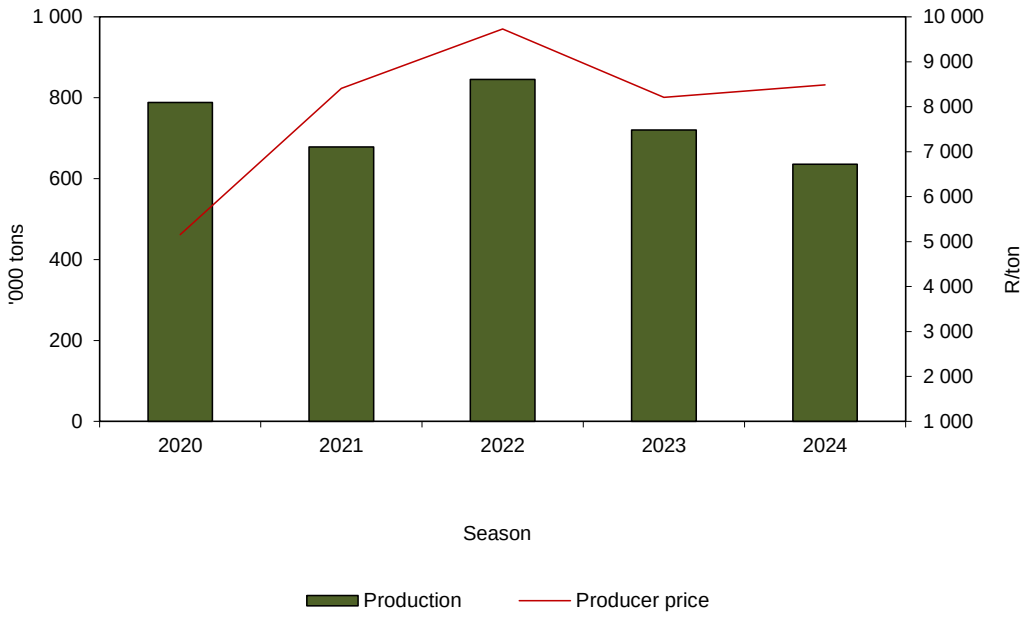
Commercial plantings, production and yields of sunflower seed from 2020 to 2024 are as follows:

Season	**2020**	**2021**	**2022**	**2023**	**2024**
Plantings (ha)	500 300	477 800	670 700	555 700	529 000
Production (t)	788 500	678 000	845 550	720 000	635 750
Yield (t/ha)	1,58	1,42	1,26	1,30	1,20

Producer prices

The average producer price increased by 3,4%, from R8 206,20/ton in 2023 to R8 487,04/ton in 2024. In terms of soya bean and sunflower seed prices, the interaction with the global market is different as South Africa is a net importer of these commodities. This means the domestic market tends to be sensitive to global developments.

Commercial production and producer prices of sunflower seed
2020–2024



South Africa's agricultural industries operate in a relatively open-market environment, where local and international factors have an impact on domestic oilseed prices. Local oilseed prices will continue to move with export parity levels for the rest of the season and will be influenced by the uncertainty created by global trade disruptions caused by variations in the international price of oilseeds, planting progress in the United States, local productions, export progress and South Africa's volatile exchange rate.

The average producer prices of sunflower seed from 2020 to 2024 are as follows:

Season	**2020**	**2021**	**2022**	**2023**	**2024**
	R/ton				
Producer price	R5 155	R8 409	R9 730	R8 206	R8 487

Consumption

The National Agricultural Marketing Council (NAMC) established the South African Grain and Oilseeds Supply and Demand Estimates Committee (S&DEC) in 2013. This committee was formed to address the specific need for accurate information pertaining to the supply of and demand for the major grain and oilseed crops, namely, white and yellow maize, wheat, sorghum, sunflower seed and soya beans.

The sunflower seed marketing season in South Africa commences on 1 March and ends on 28 February. The estimated sunflower seed crop of 635 750 tons for the 2024/25 marketing season, together with carry-over stocks of about 127 144 tons on 1 March 2024, a surplus of 10 000 tons, and projected imports of 4 000 tons, leaves the domestic supply of commercial seed at an estimated 776 894 tons for the season.

In South Africa, sunflower seed is used almost exclusively (an estimated 715 000 tons in 2024) for oil and oilcake production. The estimated domestic demand of seed for the 2024/25 marketing year is approximately 728 400 tons, including 7 100 tons for human and animal consumption. Other consumption is estimated at 3 300 tons. The projected exports during 2024 are 3 000 tons. Carry-out stocks on 28 February 2025 are expected to be approximately 48 494 tons.

Trade

Regarding exports, phytosanitary requirements and quality standards must be adhered to and a Perishable Products Export Control Board (PPECB) certificate must be obtained. For 2024, South African imports were mainly from Botswana. On the other hand, South African exports were mainly to Eswatini.

Imports and exports of sunflower seed from 2020 to 2024.

Year	2020	2021	2022	2023	2024*
	Tons				
Imports	471	1 256	6 805	12 793	4 000
Exports	1 140	217	170	68	3 000

**Projection*

International overview

The October 2024 report by the United States of Foreign Agricultural Services (FAS) indicated that the global harvested area decreased by 1,2% (340 000 ha) in 2023/24 compared to 2022/23, to a figure of 28,0 million ha.

World output of sunflower seed increased by 3,3 million tons or 6,2% from 52,8 million tons in 2022/23 to 56,1 million tons in 2023/24. It is important to note that the Ukraine and Russia, as two of the main sunflower seed exporting countries in the world, are expecting crops of 15,5 million tons and 17,1 million tons, respectively, in 2023/24. This represents an increase of 27,0% or 3,3 million tons in the Ukraine and an increase of 5,2% or 850 000 tons in the case of Russia.

The FAS October 2024 report projected that global sunflower seed production will reach 50,7 million tons in 2024/25—a decrease of 9,6% or 5,4 million tons compared to 56,1 million tons during 2023/24. Sunflower seed production in the Ukraine is expected to decrease by 3,0 million tons or 19,4% to 12,5 million tons. Sunflower seed production in Russia is expected to decrease by 1,1 million tons or 6,4% to 16,0 million tons.

Marketing, information and research

No statutory levies are applicable, and the marketing of oilseeds is free from statutory intervention.

The information function is performed by the Department of Agriculture, Land Reform and Rural Development, through the Directorate: Statistics and Economic Analysis; Grain South Africa, which promotes the interests of oilseed producers and the South African Grain Information Service (SAGIS), a section 21 company funded by, among others, the oilseeds industry.

Research is financed with income from the Oilseeds Trust and performed by the ARC, the CSIR and other organisations.

Soya beans

Various soya bean cultivars have adapted quite well to South African conditions. Depending on prevailing local conditions, soya beans are usually planted in November and December. On ripening, the leaves turn yellow and the seeds' moisture content decreases – from about 65% to 14% within 14 days – provided hot, dry weather occur.

It is a relatively difficult crop to grow and not all areas are suitable for soya bean cultivation. These plants thrive in warm, fertile, clayish soil and are mainly cultivated under dryland conditions.

Soya beans contributed approximately 12,5% to the gross value of field crops during 2023/24. The estimated average annual gross value of soya beans for the past five seasons up to 2022/23 amounts to R13 386 million.

Plantings and production

The plantings of soya beans ranged between 150 000 ha and 1,151 million ha over the past 20 years.

During the 2024 season, soya beans were grown primarily in Free State (545 000 ha or 47,4%), Mpumalanga (320 000 ha or 27,8%), North West (155 000 ha or 13,5%), Gauteng (56 000 ha or 4,9%) and KwaZulu-Natal (47 000 ha or 4,1%). The main factors contributing to this positive trend in soya bean planting include investments in new oilseed processing plants, an improved affinity by farmers to use soya beans as a rotational crop with maize and favourable soya bean prices.

During the 2024 season, an estimated 1,151 million ha were planted for commercial use, compared to an estimated 1,148 million ha the previous season. This represents an increase of 0,2% and is 32,7% more than the five-year average of 867 240 ha up to 2023. These record plantings for 2024 also surpassed the yellow maize area planted (1,082 million ha) for the second consecutive season.

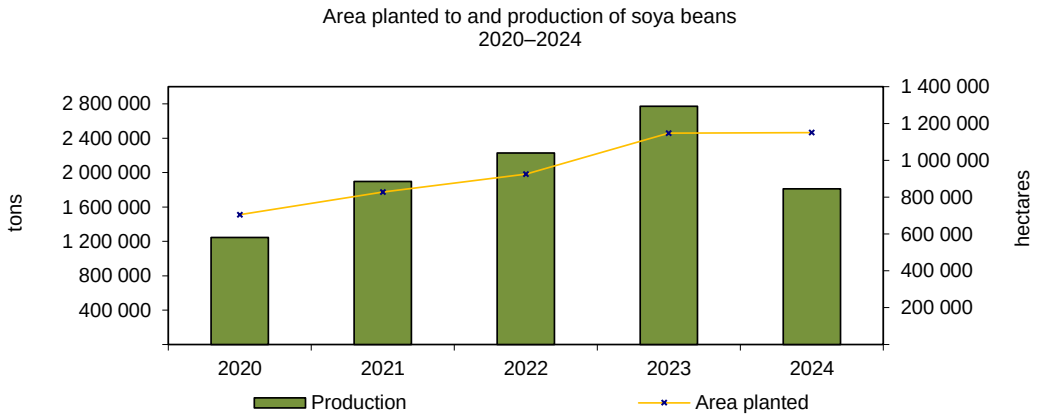
South Africa had an excellent start to the 2023/24 season, with decent rainfall recorded between October and December 2023 over most of the summer rainfall producing areas. However, in North West, rainfall was limited and scattered during the first part of the rainy season resulting in low soil moisture. As a result, most producers in North West delayed planting until the middle of December after receiving some rain. Favourable conditions in most of South Africa's oilseed-producing areas during the early parts of January provided conducive growing conditions and improved the likelihood of another bumper crop. However, excessive heat and limited rainfall across South Africa during the later parts of January and February 2024 deteriorated the yield potential of the crop.

The crop of an estimated 1,811 million tons in 2024 represents a decrease of 34,6% from the 2023 crop of 2,770 million tons. It is also 2,8% lower than the average of 1,862 million tons for the five years up to 2023. The average yield of 1,57 t/ha is 34,8% less than the 2,41 t/ha of the previous season.

South African producers benefit from international seed technology and investments into local multiplication of oilseed varieties that support yield gains over time. In addition, producers pay a statutory seed levy to the South African Cultivar and Technology Agency (SACTA) on an annual basis. SACTA was formed as a non-profit company to guarantee that breeding and technology levies are paid to seed breeding companies and plant breeder rights holders, ensuring continuous research and cultivar development.

Plantings, production and yields of soya beans from 2020 to 2024 are as follows:

Season	**2020**	**2021**	**2022**	**2023**	**2024**
Plantings (ha)	705 000	827 100	925 300	1 148 300	1 150 500
Production (t)	1 245 500	1 897 000	2 230 000	2 770 000	1 810 790
Yield (t/ha)	1,77	2,29	2,41	2,41	1,57



Producer prices

The international market mainly influences the local soya bean market. Local soya beans prices are mainly determined by import and export parity prices, as well as the derived price of oil and oil cake prices. The oilseeds market is very complex in this regard as the products that are obtained through the processing of soya beans, namely, the oil and oilcake, can be imported separately, thereby adding a third factor to the price formation mechanism of oilseeds, namely the derived price. The derived price is the calculated price that takes into account the value of the oil and oilcake imports.

The average local producer price of soya beans for 2024 is approximately R8 352/ton, which is 10,6% more than the price for 2023. Local soya bean prices are, among other factors, influenced by international soya bean and vegetable oil prices. Other factors include the level of soya bean production in South America, the demand for imported soya in China, marine freight rates and the rand/dollar exchange rate.

The average producer prices of soya beans from 2020 to 2024 are as follows:

Year	**2020**	**2021**	**2022**	**2023**	**2024**
	R/ton				
Producer price	6 325	7 221	8 505	7 549	8 352

Consumption

The National Agricultural Marketing Council established the South African Grain and Oilseeds Supply and Demand Estimates Committee (S&DEC) in 2013 after an extensive consultation process. The committee was formed to address the specific need for accurate information that relates to grain imports and exports to be made available timely to all stakeholders. In addition, there was also a need for the release of official supply and demand figures for the major grain and oilseed crops, namely, white and yellow maize, wheat, sorghum, sunflower seed and soya beans.

The soya bean marketing season in South Africa commences on 1 March and ends on 28 February. An estimated total of 2,166 million tons of soya beans were available for utilisation during the 2024 marketing season. It comprises carry-over stocks on 1 March 2024 amounting to 320 637 tons, the estimated production

(excluding retentions by producers) of 1,765 million tons, a surplus of zero tons and projected imports of 80 000 tons.

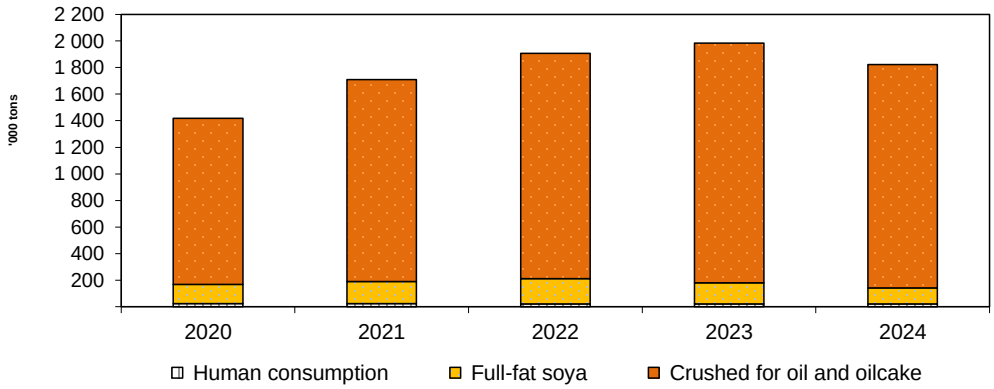
In South Africa, soya beans are mainly used for animal feed. The local demand for soya bean meal, as the preferred source of protein for animal feed, has increased in correlation with the increase in poultry production in South Africa and more than doubled over the past decade. As local production of soya bean meal was limited in the past, almost all of the local consumption had to be imported. With the expansion of the local soya bean crushing industry and soya bean production, imports as a percentage of local consumption are expected to show a decreasing trend.

The local commercial consumption of soya beans for 2024 is projected at 1,836 million tons—120 000 tons for feed (full-fat soya), 1,680 million tons for oil and oilcake and 22 000 tons for human consumption. Other consumption is estimated at 14 100 tons.

The projected exports during 2024 are 185 000 tons. Carry-over stocks on 28 February 2025 are expected to be approximately 145 000 tons.

The following graph illustrates the commercial consumption of soya beans.

Commercial consumption of soya beans
2020–2024



Trade

During the first eight months of 2024, South African exports of soya beans were mainly to Zimbabwe and Vietnam. South African imports for the mentioned period were mainly from the Zambia and Eswatini (Swaziland).

The imports and exports of soya beans from 2020 to 2024 are as follows:

Year	**2020**	**2021**	**2022**	**2023**	**2024***
	Tons				
Imports	116 100	13 400	4 200	3 500	80 000
Exports	1 100	42 300	277 500	597 000	185 000

**Projected*

International overview

According to the World Agricultural Supply and Demand Estimate (WASDE) report released in October 2024, world production of soya beans increased by 4,2%, from 378,7 million tons for the 2022/23 season to 394,7 million tons for 2023/24. The increase in world production can mainly be attributed to the larger expected crop in Argentina. Argentina contributed 12,2% (48,1 million tons) to world production. However, for the same period, a decrease is projected for Brazil, where soya bean production is expected to decrease by 9,0 million tons to 153,0 million tons and the United States with a decrease of 3,0 million tons to 113,3 million tons.

Outlook

South Africa's total oilseed processing capacity is estimated at 2,7 million tons and is derived from a combination of dedicated soya beans and sunflower seed processing facilities, as well as crushing plants with the ability to switch between soya beans and sunflower seed.

The October 2024 WASDE report projected the global production of soya beans for the 2024/25 marketing season at 428,9 million tons—an increase of 8,7% or 34,2 million tons from 394,7 million tons in 2023/24. Increases are projected for Brazil, the United States and Argentina. This increase in world production can mainly be attributed to the larger expected crop of Brazil with an increase of 16,0 million tons to 169,0 million tons, followed by the United States with an increase of 11,4 million tons to 124,7 million tons and Argentina with an increase of 2,9 million tons to 51,0 million tons.

Research and information

Locally, the ARC, the CSIR and other organisations, financed by income from the Oil and Protein Seeds Development Trust, perform research on soya beans.

The information function is performed by the Department of Agriculture, Land Reform and Rural Development, through the Directorate: Statistics and Economic Analysis; Grain South Africa, which promotes the interests of oilseed producers and the South African Grain Information Service (SAGIS), a section 21 company funded by, among others, the oilseeds industry. SAGIS collects, collates and publishes highly factual and reliable market information (stocks, imports, exports, producer deliveries and consumption) once a month. Since February 2018, SAGIS has started to report on weekly producer deliveries for soya beans and sunflower seed.

Accurate crop forecasts and estimates also play an important role by providing up-to-date information, upon which important decisions and measures can be based. The crop estimates are a result of the collated inputs of, and consensus reached by the various members of the Crop Estimates Committee.

Groundnuts

Plantings and production

The normal planting time for groundnuts is mid-October to mid-November. Groundnuts are a high value crop produced mainly in the north-western regions of South Africa, particularly the western and north-western parts of Free State, in North West and in Northern Cape. Groundnuts are also produced in Limpopo, KwaZulu-Natal and Mpumalanga, but to a lesser extent.

During the 2023/24 production season, 43,7% of the plantings were in North West, 41,3% in Free State, 10,2% in Northern Cape and 4,1% in Limpopo. The remaining 0,7% of plantings were in Mpumalanga.

Groundnuts contributed approximately 0,4% to the gross value of local field crops in 2023/24, while the average annual gross value of groundnuts for the five years up to 2023/24 amounts to approximately R410,2 million.

An estimated 41 200 ha were planted to groundnuts for commercial use, compared to 31 300 ha planted during 2022/23. This represents an increase of 31,6% and is 20,6% more than the average of 34 160 ha planted during the five years up to 2022/23.

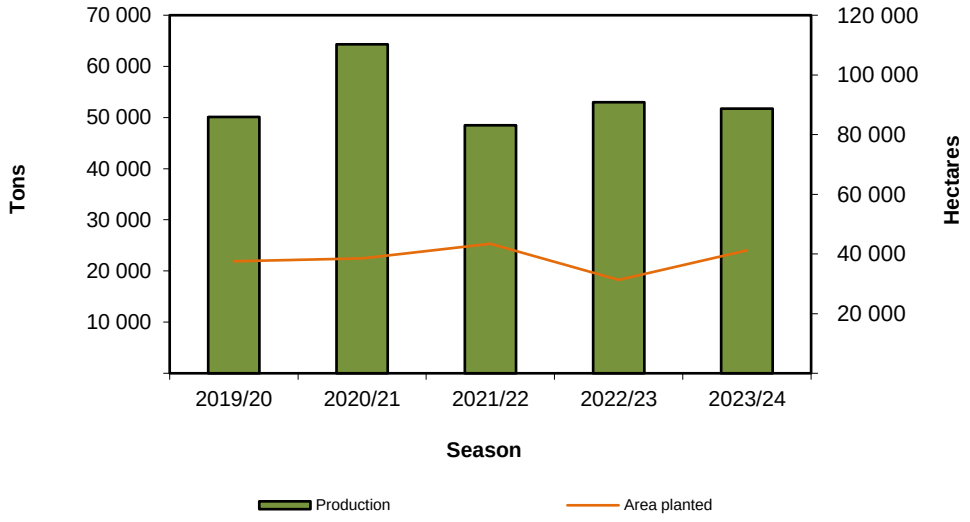
An estimated commercial crop of 51 745 tons of groundnuts was produced during 2023/24. This represents a decrease of 2,4% from the 2022/23 crop of 53 000 tons. The 2023/24 crop is 10,0% more than the five-year average of 47 056 tons up to 2022/23. The average yield for 2023/24 was 1,26 t/ha, which is 25,4% less than the 1,69 t/ha of the previous season and 8,7% less than the five-year average of 1,38 t/ha up to 2022/23.

Plantings, production and the yield of groundnuts from 2019/20 to 2023/24 are as follows:

Season	**2019/20**	**2020/21**	**2021/22**	**2022/23**	**2023/24**
Plantings (ha)	37 500	38 550	43 400	31 300	41 200
Production (t)	50 080	64 300	48 500	53 000	51 745
Yield (t/ha)	1,34	1,67	1,12	1,69	1,26

Producer prices

Area planted to and production of groundnuts
2019/20–2023/24



Groundnuts are traditionally an export commodity and local prices are determined mainly by export parity.

The average producer prices of groundnuts from the 2020/21 to 2024/25 marketing seasons were as follows:

Season	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25***
Producer price	7 934	7 831	7 874	7 871	7 920

**Preliminary*

The average producer price for groundnuts shows an increase of 0,62%, from R7 871/ton in 2023/24 to R7 920/ton in 2024/25.

Trade balance

The SA Groundnut Forum has requested all role players to comply with legally prescribed standards for permissible levels of chemical residue on groundnuts destined for export in order to maintain the market share of South African groundnuts, especially in the European Union and Japan. These regulations are based on the principle of Critical Good Agricultural Practices (CGAP).

South Africa generally applies an import duty of 10,0% ad valorem on imports of groundnuts. However, imports of groundnuts from Member Countries of the following regional structures may enter South Africa free of duty: SACU, the European Union and SADC. This is due to free trade agreements that exist between South Africa and the abovementioned regional structures.

Imports of groundnuts to and exports from South Africa during the five marketing seasons (March to February) up to 2024/25 are as follows:

Season	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25***
Imports	30 300	23 900	12 200	23 700	23 000
Exports	7 700	6 800	8 400	6 100	5 000

**Projections*

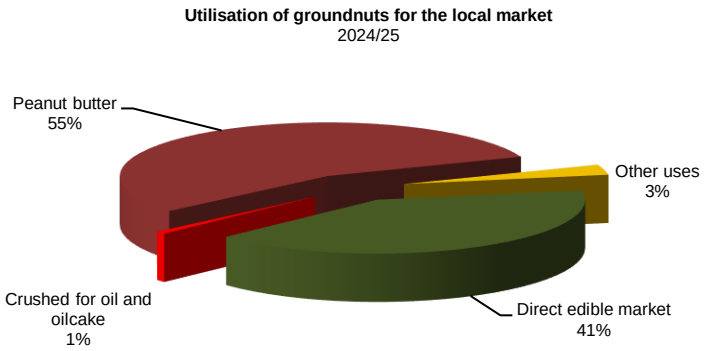
It is expected that the South African groundnuts imports could decrease by 2,9%, from 23 700 tons in 2023/24 to 23 000 tons in the 2024/25 marketing season. During the first six months of the abovementioned marketing season, South African imports of groundnuts were mainly from Brazil, Namibia, Malawi and Paraguay.

The expected groundnuts exports also show a decrease of 18,0%, from 6 100 tons in 2023/24 to 5 000 tons in 2024/25. The major export destinations for South African groundnuts are Mozambique, Japan, Belgium and the Netherlands.

Consumption

An estimated 88 245 tons of groundnuts will be available for utilisation during the 2024/25 marketing season. Carry-over stocks on 1 March 2024 amounted to 13 500 tons and the estimated production is 51 745 tons. Projected imports amount to approximately 23 000 tons.

In South Africa, groundnuts are mainly consumed in two forms, i.e., as edible nuts and processed peanut butter. The local commercial consumption of groundnuts for 2024/25 is estimated at 60 400 tons—500 tons for oil and oilcake, 34 000 tons for peanut butter, 25 000 tons for the direct edible market and 900 tons as pods. Other consumption (released to end consumers, seed, etc.) amounts to 1 900 tons. The projected exports during 2024 are 5 000 tons. Carry-over stocks on 28 February 2025 are expected to be approximately 20 945 tons.



The per capita consumption for the 2024/25 marketing season is projected at 0,61 kg, which is 7,0% more than the 0,57 kg in the previous season.

International overview

The world production of groundnuts shows an increase of 0,2% (0,10 million tons), from 49,41 million tons in 2022/23 to 49,51 million tons in 2023/24. This increase can mainly be attributed to the 15,3% (0,23 million tons) increase in Senegal's groundnut production, from 1,50 million tons in 2022/23 to 1,73 million tons in 2023/24, followed by the United States with an increase of 6,4% (0,16 million tons), from 2,51 million tons to 2,67 million tons.

The world production of groundnuts is expected to increase by 3,6% (1,80 million tons), from 49,51 million tons in 2023/24 to 51,31 million tons in 2024/25. The increase can mainly be attributed to the expected increases in the United States, India, Brazil and Sudan's production of groundnuts.

The United States' production of groundnuts is expected to increase by 9,4% or 0,25 million tons, followed by India with an expected increase of 18,3% or 1,10 million tons, Brazil with an expected increase of 23,3% or 0,17 million tons and Sudan with an expected increase of 43,9% or 0,61 million tons in 2024/25.

Canola

Canola was developed in the early 1970s using traditional plant breeding techniques by Canadian plant breeders to remove the anti-nutritional components (erucic acid and glucosinolates) from rapeseed to assure its safety for human and animal consumption. The canola plant produces seeds with a very low level of saturated fat.

Local and international investors in the oilseed-crushing sector are boosting South Africa's capacity to process local oilseed crops such as soya beans, canola and sunflower seed. This forms part of efforts to meet growing domestic demand for proteins and to be less dependent on imports of these crops.

Almost the entire canola crop in South Africa is produced in Western Cape, particularly in the Southern Cape. Over time, there were also farmers in other areas of South Africa, such as Northern Cape, Free State, Eastern Cape, KwaZulu-Natal, Limpopo and North West, who started to plant small quantities of canola.

Plantings and production

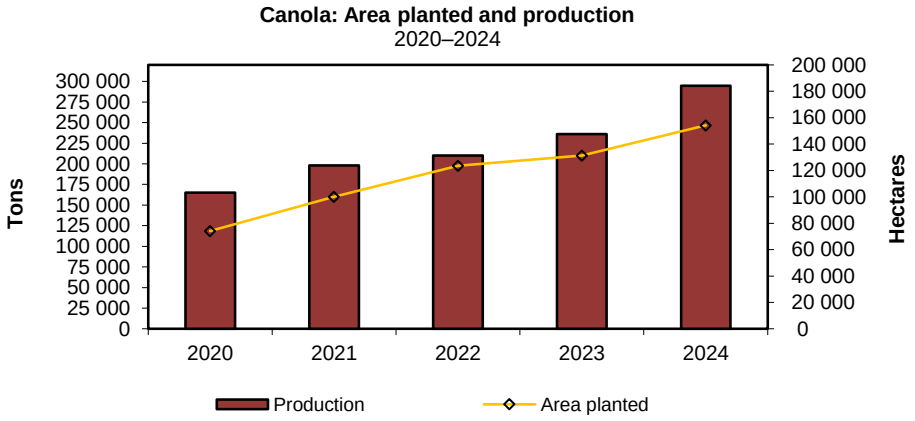
The estimated area planted to canola increased by 17,5%, from 131 200 ha in 2023 to 154 200 ha in 2024. The canola crop production is expected (September 2024) to increase by 24,7%, from 236 300 tons in 2023 to 294 645 tons in 2024, mainly due to favourable weather conditions in the Western Cape. This is the largest expected canola crop ever recorded for South Africa.

The expected average yield increased by 6,1%, from 1,80 t/ha in 2023 to 1,91 t/ha in 2024. This increase is mainly supported by an expansion in the planted area and the anticipated better yields. This is the third highest yield ever recorded.

Estimated plantings, production and yields of canola from 2020 to 2024 are as follows:

Season	**2020**	**2021**	**2022**	**2023**	**2024**
Plantings (ha)	74 120	100 000	123 510	131 200	154 200
Production (t)	165 200	198 100	210 000	236 300	294 645
Yield (t/ha)	2,23	1,98	1,70	1,80	1,91

The areas planted to, and production of canola is depicted in the following graph.



The planting of canola as an alternative to small grain crops has become an important part of crop rotation practices in Western Cape. It is particularly the herbicide-resistant cultivars that make it possible for canola to be included in crop rotation systems with wheat in many regions. In such crop rotation systems, canola usually causes an increase in the yields of the subsequent crops.

Consumption

Canola oil is the healthiest commodity oil available to consumers, the food service industry and food processors. Canola oil contains the least amount of saturated fat (7%) of any common edible oil, with the remaining 93% being healthy monounsaturated and polyunsaturated fats. The polyunsaturated fats in canola oil are essential omega-3 and omega-6 fatty acids. The omega-3, alpha-linolenic acid, may help prevent heart attacks and strokes. The omega-6, linoleic acid, is important for the brain and essential for the growth and development of infants.

Canola meal is used as an animal feed for dairy cows, pigs and poultry. Its unique characteristics are especially valuable in the dairy industry, where it has been shown that by including 20% canola meal in a feed ration improves milk production by one litre per cow per day.

Canola is primarily used for the manufacturing of canola oil and oilcake. On the local market, canola competes with other oilseeds such as sunflower seed and soya beans. The market for soft oils (oils that are liquid at room temperature), including canola oil, is a huge one and applications for this market are typically bottled oil for household use, e.g., soft margarine, mayonnaise, salad oil and various industrial uses.

The total supply of canola is projected at 275 640 tons for the 2023/24 marketing season. This includes an opening stock as from 1 October 2023 of 39 340 tons, domestic production of 236 300 tons and no imports this marketing season. Total demand for canola for the 2023/24 marketing season was approximately 204 000 tons, while carry-out stocks on 30 September 2024 were approximately 41 640 tons.

For the 2024/25 marketing season, the total supply of canola is estimated at 336 280 tons (the estimated canola crop of 294 645 tons, together with carry-over stocks of 41 640 tons). Domestic demand for canola is estimated at 204 000 tons, while carry-out stocks at the end of September 2025 is expected to reach 99 280 tons.

Prices

As a large percentage of the local demand for vegetable oil is imported, the international oilseed prices largely determine the local prices of oilseeds and therefore the price of soya bean oilcake. The price of canola oil is based on the local price of sunflower oil and soya bean oilcake. Prices paid to producers vary, depending on the protein content and whether it is delivered for the feed market or to be crushed for oil.

The average producer prices of canola from 2020 to 2024 are as follows:

Season	**2020**	**2021**	**2022**	**2023**	**2024**
	R/ton				
Producer price	6 200,00	8 933,00	10 666,89	8 500,00	8 500,00

The average producer price of canola for 2024 is expected to be R8 500,00/ton, the same as for 2023.

International overview

Global canola production has grown rapidly over the past 40+ years, rising from the sixth largest oil crop (soya beans, canola/rapeseed, peanuts, sunflower seed, cotton seed, palm kernel and copra) to the second largest. During 2024/25, canola production is expected to contribute 12,7% to world oil crop production. During the same period, soya bean production, which is the largest oilseed crop, is expected to contribute 62,4% of the world oilseed crop production.

The Foreign Agricultural Service USDA Report indicated in September 2024 that world production of canola/rapeseed decreased by 2,0%, from 89,4 million tons in the 2023/24 marketing season to 87,6 million tons in the 2024/25.

The key global canola producers during the 2024/25 marketing year are Canada contributing 22,8% (20,0 million tons), the European Union contributing 20,2% (17,7 million tons), China contributing 17,8% (15,6 million tons), India contributing 13,8% (12,1 million tons) and other countries contributing 25,4% (22,2 million tons) to world production.

The European Union, China and Japan are the primary importers (70,8%) of canola seed, while Canada accounts for 40,5% of canola seed exports.

Global canola consumption is expected to reach 89,0 million tons for 2024/25, compared to 88,0 million tons for 2023/24—an increase of 1,2%.

Global ending stocks for 2024/25 are expected to decline by 1,9 million tons, from 10,2 million tons in 2023/24 to 8,3 million tons in 2024/25.

Research and information

The Western Cape Department of Agriculture conducts research and cultivar trials on canola. The Protein Research Foundation (PRF) funds this research and it is the task of the canola-working group of the PRF to promote the local canola industry.

The information function for canola is performed by the SAGIS; a section 21 company funded by, among others, the oilseeds industry.

Cotton

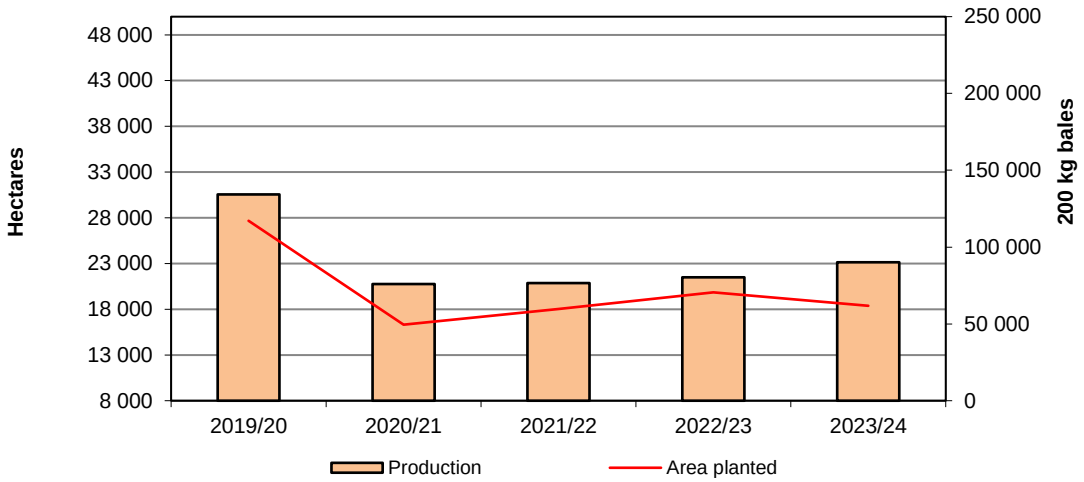
In South Africa, cotton is grown in the warm regions of Limpopo, Mpumalanga, Northern Cape, North West and KwaZulu-Natal where minimum night temperatures are at least 15 °C during the growing season. Cotton is planted mainly during October, although planting can be done until the second half of November.

The cotton industry is labour intensive and provides work for roughly one worker per hectare of cotton planted. Oil extracted from cottonseed can be used for cooking and salad dressings. Extracted seed can also be used as a fertiliser or as feed for livestock, poultry and fish.

Area planted and production

The total area planted to cotton in South Africa for the 2023/24 production season is estimated at 18 385 ha, which is an increase of 7,4% from 19 864 ha of the previous season.

Area planted to cotton and production of cotton lint in the RSA
2019/20–2023/24



Source: Cotton SA

Yields per hectare under irrigation are 5,3% more than on dry land. An estimated average yield of 5 071 kg/ha seed cotton was realised on irrigated land during the 2023/24 production season, compared to 954 kg/ha realised on dryland.

During 2023/24, an estimated 60,7% of the total area planted to cotton was on dryland, as against 68,2% in the previous season. The area under irrigation also decreased by 14,6% from 2022/22 to 2023/24.

The domestic production of cotton lint for the 2023/24 marketing season (April to March) is estimated at 90 118 bales of 200 kg each, which is an increase of 12,3% from the 80 225 bales produced during the 2022/23 season.

Areas planted to cotton and the production of cotton lint from the 2019/20 to 2023/24 production seasons by the RSA and Eswatini compare as follows:

RSA

Production season	**2019/20**	**2020/21**	**2021/22**	**2022/23**	**2023/24**
Total RSA plantings (ha)	27 675	16 313	18 018	19 864	18 385
Dryland (ha)	16 132	5 802	10 823	13 556	11 159
Irrigation (ha)	11 543	10 511	7 195	6 308	7 226
Production of cotton lint (200 kg bales) from RSA-grown cotton	134 230	76 009	76 659	80 225	90 118

Eswatini

Production season	**2019/20**	**2020/21**	**2021/22**	**2022/23**	**2023/24**
Total Eswatini plantings (ha)	1 417	0	1 585	1 660	1 112
Dryland (ha)	1 000	0	1 000	1 000	1 000
Irrigation (ha)	417	0	585	660	112
Production of cotton lint (200 kg bales) from Eswatini-grown cotton	1 995	0	4 260	4 490	2 889

** Estimates (October 2024)*

Source: Cotton SA

World cotton production for 2023/24, as forecast by the International Cotton Advisory Committee (ICAC), is expected to be 25,3 million tons. Mill use is projected at 25,4 million tons for 2023/24; the global economic growth has weakened, and this slowdown is expected to continue in 2024/25.

The international reference price of cotton, as measured by the Cotlook A-index, has risen to 81 US cents per pound.

Cotton is an agricultural product and the uncertainties in production, consumption, weather condition and pest pressures all contribute to the price volatility surrounding these uncertainties.

The average producer price for seed cotton (lint and seed derived from the boll of the cotton plant before it is ginned) for the 2022/23 marketing season (April to March) was 829 c/kg, while the price for 2023/24 is projected to decrease to 776 c/kg. In South Africa, the price of cotton normally emulates global price trends.

The average South African producer prices for seed cotton and cotton lint compare as follows:

Marketing year	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25***
	c/kg				
Seed cotton	772	886	829	776	726
Cotton lint	2 156	2 537	2 347	2 171	2008

**Projections*

Consumption

Consumption of cotton lint by RSA and Eswatini spinners for the 2023/24 marketing year is estimated at 95 456 bales of 200 kg, compared to the 78 835 bales of the 2022/23 year—an increase of 21,1%.

Consumption of cotton lint by South African and Eswatini spinners compared as follows:

Marketing year	**2019/20**	**2020/21**	**2021/22**	**2022/23**	**2023/24***
	200 kg bales				
Consumption	85 400	60 270	97 400	78 835	95 456

**Projection*

Marketing arrangements, information and research

In terms of the free trade agreement between countries within the SADC region that has been in force since 2000, there has been no duty on cotton imports since 1 January 2004.

Locally, either the seed cotton is sold to a ginner who gins and sells lint to spinners and seed to processors, or a producer may contract a ginner to gin at a fee, in which case the lint will be sold either by the producer or by the contracted ginner on the producer's behalf.

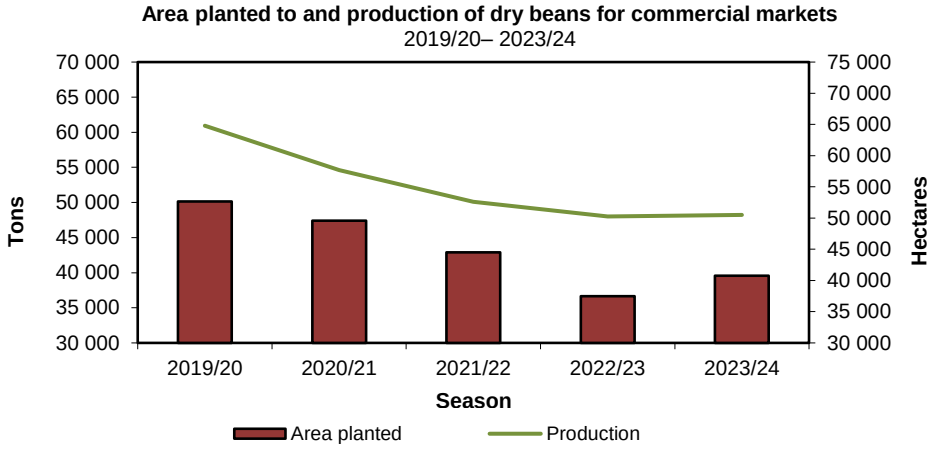
After the Cotton Board was dissolved in 1998, stakeholders in the cotton industry formed a section 21 company named Cotton SA. A statutory levy, which was introduced in April 2004 in terms of the Marketing of Agricultural Products Act, 1996 (Act No. 47 of 1996), is applicable to finance research and the other functions of Cotton SA, namely information, promotion and grading. Research is coordinated by Cotton SA and performed by the ARC.

Dry beans

Areas planted and production

According to the Crop Estimates Committee, an estimated 39 550 ha were planted to dry beans for commercial markets during the 2023/24 production season, compared to 36 650 ha planted in 2022/23. This represents an increase of 7,9% as compared to 2022/23 and is also 16,3% less than the average of 47 278 ha planted during the five years up to 2022/23. The estimated commercial crop of 50 495 tons for 2023/24 is 0,5% more than the previous crop of 50 260 tons. The 2023/24 crop is 13,4% less than the five-year average of 58 335 tons up to 2022/23. The average yield for the 2023/24 crop is approximately 1,28 t/ha—a decrease of 6,9% from the 1,37 t/ha of the previous season.

Limpopo produced 47,1% (23 790 tons) of the 2023/24 commercial crop, followed by Free State with 21,4%



(10 800 tons), North West with 11,9% (6 000 tons) and Mpumalanga with 9,3% (4 680 tons). The remaining 10,3% (5 225 tons) was produced in the other provinces.

Production in the provinces and their share of the 2023/24 dry bean crop are as follows:

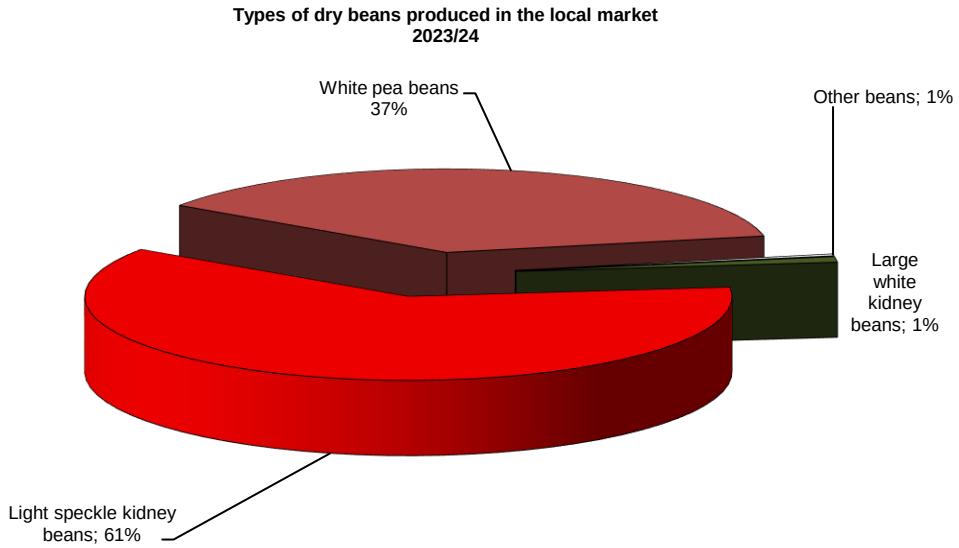
Province	Production (t)	Share in crop (%)
Western Cape	220	0,44
Northern Cape	900	1,78
Free State	10 800	21,39
Eastern Cape	440	0,87
KwaZulu-Natal	2 730	5,41
Mpumalanga	4 680	9,27
Limpopo	23 790	47,11

Gauteng	935	1,85
North West	6 000	11,88
Total	50 495	100,00

Dry beans contributed an estimated amount of R1 405 million to the gross value of field crops for the 2023/24 season, which is 24,2% more than the R1 131 million of the previous season, while the average annual gross value of dry beans for the five years up to 2022/23 amounts to approximately R983 354 million.

The contribution of different types of dry beans to total local production in 2023/24 is estimated to be as follows:

Light speckled kidney beans – 30 939 tons (61,3%), white pea beans – 18 855 tons (37,3%), large white kidney beans – 516 tons (1,0%) and other dry beans – 186 tons (0,4%), mainly cariocas.



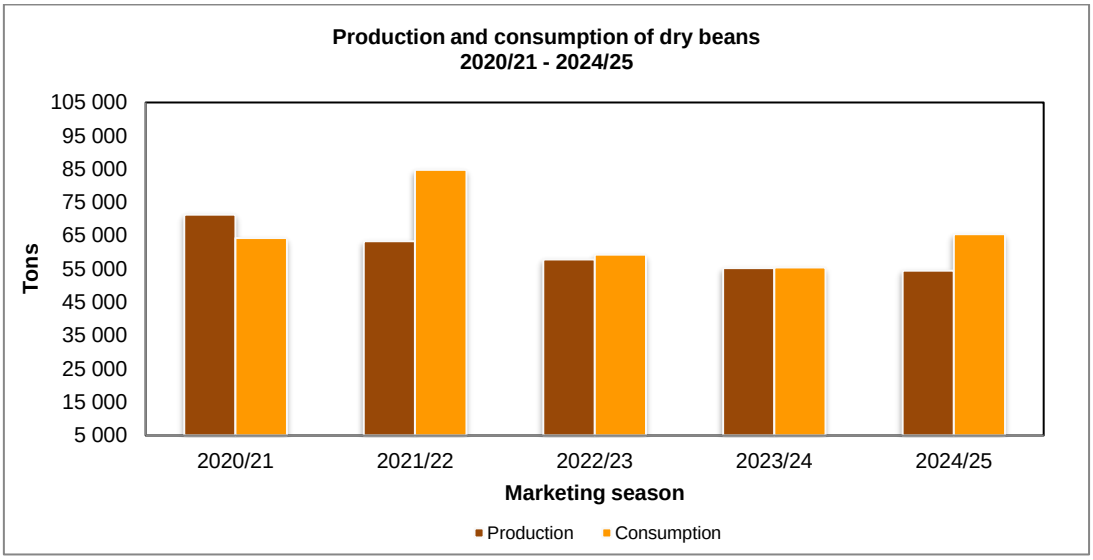
The most extensive seed production takes place in the Lowveld area of Mpumalanga, followed by Limpopo and Northern Cape.

In an attempt to improve profitability for producers and to meet the increase in protein demand, new cultivars with higher yields have been developed by the Dry Bean Producers' Organisation in cooperation with the ARC's Grain Crops Institute. These cultivars are suited for most soil types, have greater resistance to diseases and can be grown successfully in different areas.

Consumption

An estimated amount of 65 503 tons of dry beans is expected to be consumed locally during the 2024/25 marketing season (April to March), which is 18,2% more than the 55 424 tons in 2023/24. The projected per capita consumption for 2024/25 is 0,92 kg, which is 19,5% more than the 0,77 kg in 2023/24.

According to the Department of Agriculture, Land Reform and Rural Development, the quantities of dry beans produced and consumed from the 2020/21 to the 2024/25 marketing season were as follows:



Producer prices

The average prices received by producers for dry beans from the 2019/20 to 2023/24 production season are as follows:

Production season	**2019/20**	**2020/21**	**2021/22**	**2022/23**	**2023/24**
	R/t				
Producer price	12 892	14 396	19 232	20 457	25 769

The average producer price of dry beans increased by 26,0%, from R20 457/ton in the 2022/23 production season to R25 769/ton in the 2023/24 production season. The producer price of dry beans in South Africa is derived mainly from import parity from China and local supply and demand has little to no effect on price determination.

Trade balance

Imports of dry beans to and exports from South Africa during the five marketing seasons from 2020/21 up to 2024/25 are as follows:

Marketing season	**2020/21**	**2021/22**	**2022/23**	**2023/24**	**2024/25***
	Tons				
Imports	27 380	43 148	28 850	18 908	24 073
Exports	34 332	21 735	26 925	18 770	13 086

**Projection*

The expected imports of dry beans show an increase of 27,3%, from 18 908 tons in 2023/24 to 24 073 tons in 2024/25. Imports of dry beans during the first eight months of the 2024/25 marketing season were mainly from China, Argentina, Brazil and Botswana.

The projected exports of dry beans decreased by 30,3%, from 18 770 tons in 2023/24 to 13 086 tons in the 2024/25 marketing season. During the first eight months of the 2024/25 marketing season, exports of dry beans were mainly to Eswatini (Swaziland), Zimbabwe, India and Lesotho.

Research and information

The Dry Bean Producers' Organisation is the national commodity organisation promoting the interests of the dry bean producers in the country. The main objectives of the organisation are to provide production and market information, support product and market research and ensure the supply of disease-free certified seed to producers.

Sugar

Sugar cane is a ratoon crop, which means that after cropping, new shoots emerge from the roots. It yields up to 10 crops from the original rootstock, after which it is uprooted, and the field is replanted. This is done on a rotational basis, with approximately 10% of the area under sugar cane being replanted each season. Planting usually coincides with the first spring rains.

In the cooler production areas, sugar cane is harvested 18 to 24 months after re-sprouting. Late harvesting maximises growth and the sucrose content of the cane. In the coastal areas, where the crop grows faster, it is harvested at an average age of approximately 12 months, usually from April to December.

Industry overview

The South African Cane Growers' Association, established in 1927, administers the sugar cane-growing industry in South Africa. The industry is regulated in terms of the Sugar Act, 1978 (Act No. 9 of 1978) and the Sugar Industry Agreement (SIA 2000), which are binding on all sugar cane growers and producers of sugar products.

The cane-growing sector comprises approximately 21 926 registered sugar cane growers farming predominantly in KwaZulu-Natal (KZN) and Mpumalanga.

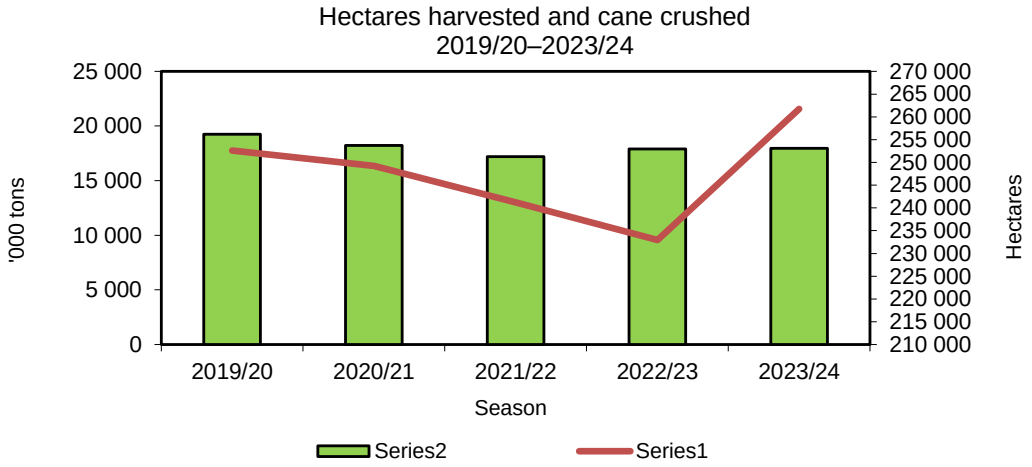
Six milling companies manufacture sugar with 14 sugar mills operating in the cane growing regions.

The R14 billion South African industry is cost effective, consistently ranking in the top 15 out of approximately 120 sugar-producing countries worldwide. The industry combines sugar cane production and production of sugar (raw or refined), syrup and some by-products.

Employment within the industry is estimated at 435 000 people (direct and indirect) and the industry have produced an average of approximately 2,2 million tons of sugar per season.

Production and price of sugar cane

The production of sugar cane increased by 0,2% to 17,94 million tons produced in 2023/24 from 17,91 million tons that was produced in 2022/23 production season.



The average cane production over the past decade (from the 2015/16 to the 2023/24 season) is 17,5 million tons per annum, with the yield of harvested cane averaging 69,5 t/ha over the same period. The yield stands at 76,9 t/ha for the 2022/23 season. The area harvested increased by 12,4%, from 232 956 ha in 2022/23 to 261 740 ha in 2023/24.

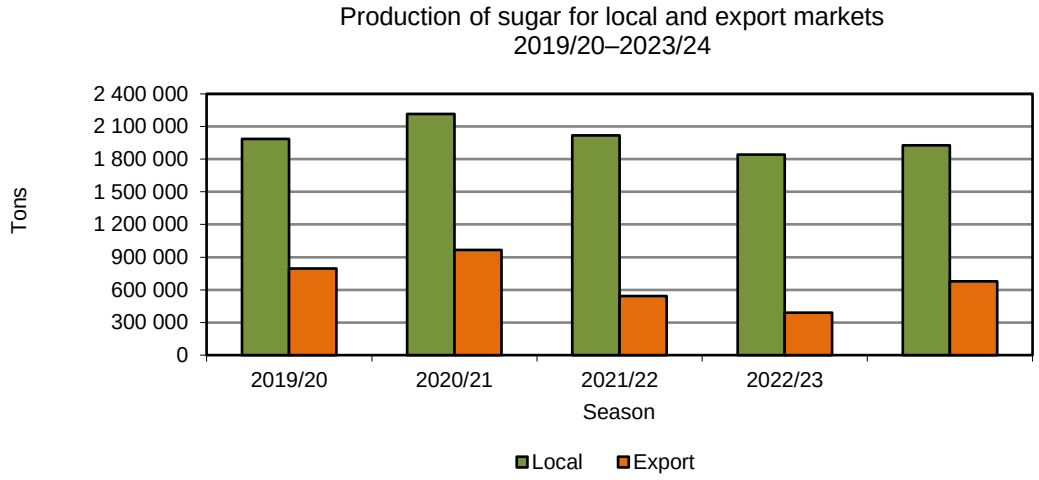
The producer price of sugar cane increased by 38,3%, from R647,16/t in 2022/23 to R895,29/t in 2023/24.

The average producer prices of sugar cane from 2019/20 to 2023/24 were as follows:

Year	**2019/20**	**2020/21**	**2021/22**	**2022/23**	**2023/24**
	R/ton				
Producer price	517,38	613,28	644,63	647,16	895,29

Production and consumption of sugar

The local production of sugar reached a record level of 2,76 million tons during the 2002/03 season. For 2023/24, production is estimated at 2,01 million tons. The quantity of cane crushed to produce one ton of sugar stands at 8,95 tons for the 2023/24 season.



Marketing

The Sugar Act, 1978 (Act No. 9 of 1978) and the Sugar Industry Agreement (SIA 2000), endorse a regulatory provision within which the pricing of refined sugar in South Africa takes place. The combination of the regulatory provisions allows the sugar industry to maintain a domestic sugar price that is at or near the import parity price, including the tariff that eradicates price discrimination and anti-competitive practises within the industry. With sugar prices pushed up close to import parity price, the country's sugar industry can maximise profit that will impact positively on the economy.

South Africa continues to be one of the world's most cost competitive producers of high-quality sugar and the key drivers of excellence is its export infrastructure, world-renowned agriculture, industry research platforms and efficient industry organisation.

The raw sugar exports are handled at the Sugar Terminal in Durban. The terminal provides storage and handling facilities for the sugar industry's export production of bulk raw and bagged (raw and refined) sugar. It also houses a unique molasses mixing plant, which coats bulk raw sugar at the time of loading to produce variable levels of quality, as specified by the international buyers.

A total of 494 306 tons of sugar were produced for the international market during the 2023/24 season. About 60% of this sugar is marketed in the Southern African Customs Union (SACU) and the remainder is exported to markets in Africa, Asia and the Middle East. The total supply of 1,51 million tons of sugar to the Southern African Customs Union (SACU) during 2023/24 is an increase of 20,9% from the 1,25 million tons supplied in 2022/23.

The local production and sales of sugar to the SACU from 2019/20 to 2023/24 were as follows:

Year	**2019/20**	**2020/21**	**2021/22**	**2022/22**	**2023/24**
	'000 tons				
Production	2 217	2 018	1 842	1 926	2 005
Sales to SACU	1 249	1 476	1 453	1 250	1 510

Research, training and other information

To improve the quality of the cane produced and the profitability of cane production, the South African Sugarcane Research Institute is tasked with developing new sugar cane varieties and the improvement of crop management and farming systems, which are then made available to cane farmers. This information includes improving soil quality, minimising the occurrence of pests and diseases and research on the optimal choice in the use of fertilisers, water and ripening and weed-control agents.

Currently, modern biotechnological approaches are deployed to develop systems for rapid bulking and distribution of high-quality cane seed and investigate the biological basis of sucrose accumulation in sugar cane, with a view to enhance the process. The quality of cane deliveries to the mills is determined by the Cane Testing Services, while Umthombo Agricultural Finance assists small-scale cane farmers with regard to credit and savings facilities.

HORTICULTURE

Deciduous fruit

Production areas

The main deciduous fruit producing areas of South Africa are situated in Western Cape and Eastern Cape, mostly in areas where warm, dry summers and cold winters prevail. According to the HORTGRO Tree Census of 2023, the area under deciduous fruit production during the 2023/24 season is estimated at 54 271 ha, a decrease of 810 ha (1,5%) compared to 55 081 ha the previous year.

The areas planted in hectares (ha) per fruit type over the past five seasons compare as follows:

Fruit type	2019/20	2020/21	2021/22	2022/23	2023/24
	Hectares				
Apples	24 930	25 272	25 209	25 438	25 114
Pears	12 674	12 913	12 848	12 950	12 892
Table grapes	21 100	20 564	20 379	19 788	19 488

Peaches and nectarines	8 171	8 049	7 809	8 056	7 682
Apricots	2 448	2 371	2 240	2 241	2 223
Plums	5 319	5 451	5 523	5 465	5 430

Production

In South Africa, there are about 1 155 producers of stone fruit and of pome fruit.

Fruit type	2019/20	2020/21	2021/22	2022/23	2023/24
	Tons				
Apples	997 255	1 144 771	1 302 041	1 367 370	1 384 393
Pears	428 007	456 238	550 785	506 939	488 876
Table grapes	321 429	362 208	376 228	360 707	370 424
Peaches and nectarines	163 235	169 101	190 511	177 704	151 310
Apricots	15 538	33 195	24 291	31 030	27 004
Plums	65 373	101 969	111 809	93 447	89 316
Total	1 990 837	2 267 482	2 555 665	2 537 197	2 508 323

The production (tons) per fruit type, which excludes dried fruit, over the past five seasons compares as follows:

The production of deciduous fruit decreased by (1,1%), from 2,537 million tons in 2022/23 to 2,508 million tons in 2023/24. The production of all fruits showed a decrease, except apples which showed an increase of (1,1%) from 1,367 million tons in 2022/23 to 1,384 million in 2023/24, followed by grapes with an increase of (2,7%) from 360 707 tons in 2022/23 to 370 424 tons in 2023/24.

Peaches and nectarines showed a huge decrease of 26 394 tons (14,9%), followed by pears with 21 063 tons (4,2%), plums with 4 131 tons (4,4%) and apricots with 4 026 tons (13,0%), respectively.

Marketing

During 2023/24, deciduous fruit contributed approximately 26,1% to the gross value of horticultural products.

Approximately 432 249 tons of deciduous fruit were sold locally on the major fresh produce markets, other markets and directly to retailers during the 2023/24 season, representing a decrease of 6,1% from 460 530 tons sold during the 2022/23 season.

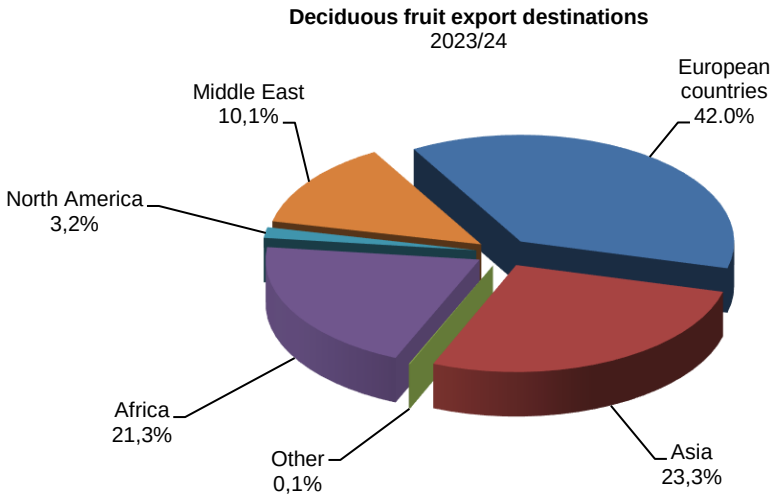
The average prices (R/ton) realised for deciduous fruit on the major fresh produce markets during the period 2019/20 to 2023/24 were as follows:

Fruit type	2019/20	2020/21	2021/22	2022/23	2023/24
	R/ton				
Apples	7 454	7 590	7 421	8 562	9 971
Pears	7 127	7 192	7 087	8 210	9 768
Table grapes	16 981	17 447	18 766	20 440	24 295
Peaches and nectarines	14 571	15 294	14 733	15 582	18 416
Apricots	18 065	15 326	17 114	18 134	19 168
Plums	9 524	8 669	8 202	9 494	11 249

The price of grapes showed the biggest increase of R3 855/ton (18,9%), followed by peaches and nectarines with R2 834/ton (18,2%), plums with R1 755/ton (18,5%) and pears with R1 558/ton (19,0%), while apples showed the least increase of R1 409/ton (16,5 %) followed by apricots with R1 034/ton (5,7%).

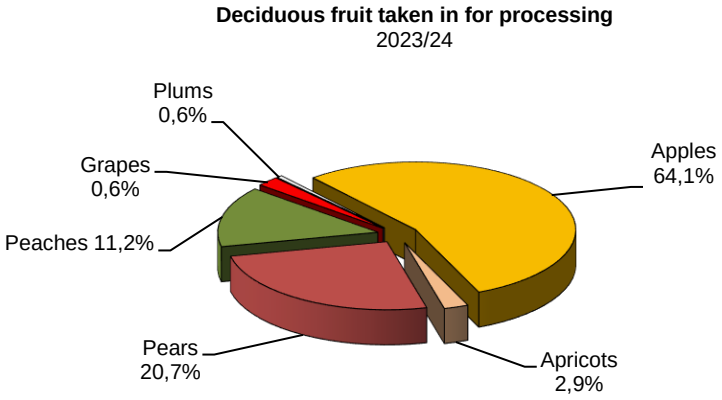
The exporting of deciduous fruit is a major earner of foreign exchange for South Africa. During the 2023/24 season (October to September), about 50,9% of deciduous fruit produced was exported and approximately 81,1% of the gross value from deciduous fruit came from export earnings. Total exports amounted to 1 276 243 tons. This represents an increase of 4,6% from the 1 219 939 tons exported during 2022/23.

The following graph indicates deciduous fruit export destinations during 2023/24.



Intake of deciduous fruit for processing

During 2023/24, about 799 830 tons of deciduous fruit produced were utilised for processing—a decrease of 6,6% from the 856 727 tons processed during 2022/23.



The following graph indicates the contribution of deciduous fruit types to total deciduous fruit taken in for processing during 2023/24.

Over the past five seasons, 77% of deciduous fruit was processed into juice, while 15% of canning were mostly used for peaches and apricots

During 2023/24, approximately 87,7% of apples taken in for processing was used for juice and 0,9% was used for canning, while 78,7% of pears was used for juice and 21,3% was canned. Producers received an average of R2 586/t and R2 075/t for apples used for canning and for juice, respectively. Regarding pears, producers received the average price of R2 946/t and R1 904/t for canning and juice, respectively.

Domestic consumption

Local per capita consumption and total consumption of deciduous fruit over the past five years were as follows:

Season	**2019/20**	**2020/21**	**2021/22**	**2022/23**	**2023/24**
Per capita consumption (kg/year)	11.46	12.44	14.79	16.9	14.84
Total consumption (‘000 tons)	683	748	917	1007	935

Prospects

The 2024/25 production season of pome fruits, such as apples and pears ,are expected to increase by 9% and 8%, respectively. There are indications that the production for stone fruit will increase.

Citrus fruit

Production areas

Citrus fruit is grown in Limpopo, Eastern Cape, Mpumalanga, Western Cape and KwaZulu-Natal in areas where subtropical conditions (warm to hot summers and mild winters) prevail.

The area under citrus production is estimated at 99 755 ha, according to CGA Industry Statistics 2024.

Production

Oranges contributed about 44% to the total production of citrus fruit in South Africa during 2023/24. Citrus fruit production decreased by 1,3%, from 3 674 001 tons in 2022/23 to 3 625 181 tons in 2023/24. There has been an annual average increase of 4% (CAGR Formular) over the past five years in citrus production.

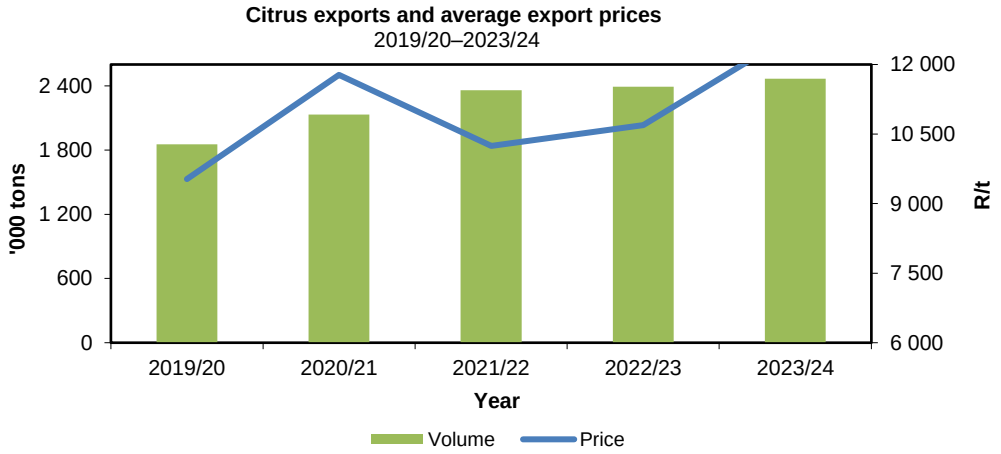
Citrus fruit production for the past five production seasons (1 February to 31 January) is as follows:

Fruit type	**2019/20**	**2020/21**	**2021/22**	**2022/23**	**2023/24**
	Tons				
Oranges	1 687 332	1 499 411	1 614 848	1 787 667	1 605 256
Grapefruit	379 173	349 453	352 618	423 692	410 718
Lemons	506 570	645 055	655 994	778 812	811 437
Naartjes	89 963	85 196	112 974	116 263	112 772
Soft citrus	326 942	415 569	520 613	567 567	684 998
Total	2 989 980	2 994 684	3 257 047	3 674 001	3 625 181

Exports

The citrus industry in South Africa is primarily export-orientated, with very small quantities being imported. South Africa is one of the major citrus fruit exporters in the world.

Exports increased from 2 391 808 tons during 2022/23 to 2 468 382 tons during 2023/24 an increase of 3%. During 2023/24, the top five importing markets for the citrus fruit exported by South Africa includes Netherlands, United Arab Emirates, United Kingdom, Russian Federation and United States of America. South Africa's citrus exports represent 11,3% of world exports for this product, its ranking in world exports is Number 2 (ITC,2024). About 1 117 354 tons of oranges (approximately 45% of the citrus crop) were exported.



Domestic sales

Citrus fruit sales on the major fresh produce markets in South Africa decreased by 24%, from 196 854 tons during 2022/23 to 159 302 tons during 2023/24 and comprised about 4% of total citrus fruit production. Approximately 53% of the oranges production, 15% of lemon, 15% of naartjes and 6,0% of soft citrus were sold on the fresh produce markets.

The average prices realised on the major fresh produce markets during the period 2019/20 to 2023/24 were as follows:

Fruit type	**2019/20**	**2020/21**	**2021/22**	**2022/23**	**2023/24**
	R/ton				
Oranges	3 639	4 908	3 994	3 305	4515
Grapefruit	2 925	6 420	6 33	4 664	6951
Lemons	6 494	6 886	5 364	4 941	5940
Naartjes	5 288	6 654	6 437	6 201	2406
Soft citrus	6 043	7 193	6 710	5 651	7857

Processing

Approximately 24,2% of the total citrus fruit production was taken in for processing during 2022/23. Citrus fruit taken in for processing decreased by 6 %, from 890 019 tons in 2022/23 to 839 340 tons in 2023/24.

Consumption

Per capita consumption of citrus fruit from 2019 to 2023 was as follows:

Year	2019	2020	2021	2022	2023
	kg/year				
Per capita consumption	15,15	10,62	10,91	16,91	15,63

Research

The Citrus Research International (CRI) is mandated by the Citrus Growers' Association of Southern Africa (CGA) to maximise the long-term global competitiveness of the Southern African citrus growers through the development, support, coordination and provision of research and technical services. The CRI is a division of the CGA and research funding is primarily derived from levies on citrus exports.

Vegetables (excluding potatoes)

General

Vegetables are produced in most parts of the country. However, in certain areas farmers tend to concentrate on specific crops; for example, green beans are grown mainly in Kaapmuiden, Marble Hall and Tzaneen; green peas mainly in George and Vaalharts; onions mainly in Caledon, Pretoria and Brits and asparagus mainly in Ficksburg.

Production

From 2022/23 to 2023/24 (July to June), the total production of vegetables (excluding potatoes) increased by 3,7%, from 2 873 041 tons to 2 979 221 tons. All the major vegetable types in terms of volumes produced increased, except for green mealies and sweet corn, and pumpkins that decreased by 0,7% and 2,5%, respectively.

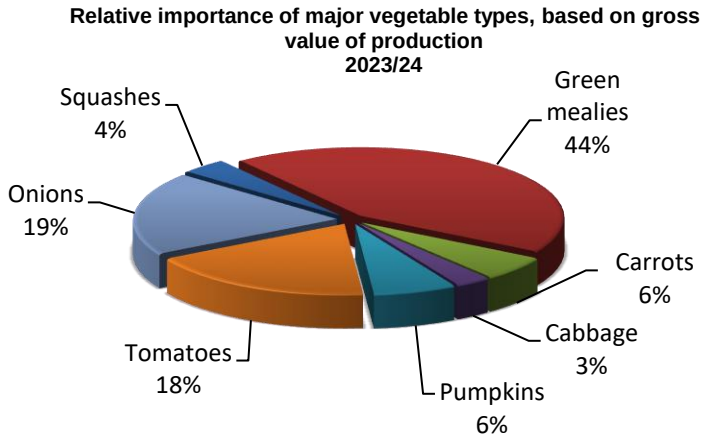
The production of vegetables (excluding potatoes) in South Africa for the period 2019/20 to 2023/24 compares as follows:

Year	2019/20	2020/21	2021/22	2022/23	2023/24
	'000 tons				
Tomatoes	620	543	534	492	533
Onions	746	713	737	642	697
Green mealies and					

sweet corn	401	418	419	427	424
Cabbages	163	170	191	189	212
Pumpkins	275	271	274	285	278
Carrots	222	223	239	213	221
Other	686	665	653	625	614
Total	3 113	3 002	3 047	2 873	2 979

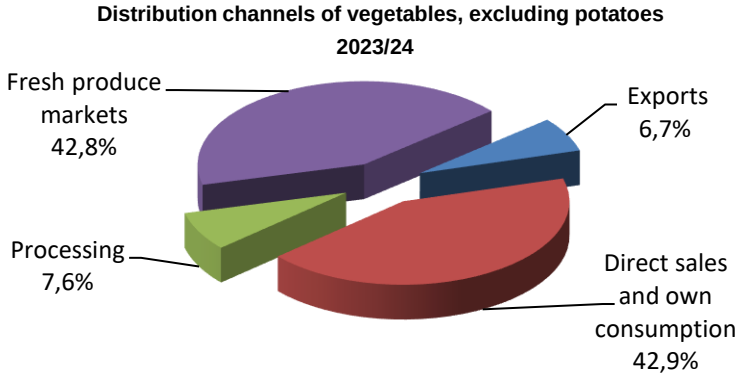
Relative importance of major vegetable types

The relative importance of the major vegetable types, according to gross value of production during the 12 months up to 30 June 2024, is depicted in the following graph:



Distribution channels

As depicted in the following graph, approximately 43% of the volume of vegetables produced is traded on the major fresh produce markets. The total volume of vegetables (excluding potatoes) sold on these markets during 2023/24 amounted to 1 275 828 tons, as against 1 244 208 tons sold during 2022/23, which represents an increase of 2,5%.



The values of sales of vegetables (excluding potatoes) on the major South African fresh produce markets for the period 2019/20 to 2023/24 were as follows:

Year	**2019/20**	**2020/21**	**2021/22**	**2022/23**	**2023/24**
	R'000				
Tomatoes	2 012 454	2 169 955	2 067 306	2 312 579	2 397 469
Onions	1 775 987	1 558 715	1 556 710	3 051 576	2 432 102
Green mealies and sweet corn	80 726	81 716	84 225	93 989	96 868
Cabbage	327 106	344 452	325 567	434 456	433 175
Pumpkins	134 430	149 622	158 505	135 067	185 871
Carrots	529 929	555 241	485 307	653 971	674 325
Other	2 748 981	3 052 497	2 878 957	3 193 046	3 817045
Total	7 609 613	7 712 198	7 556 577	9 856 315	9 603 680

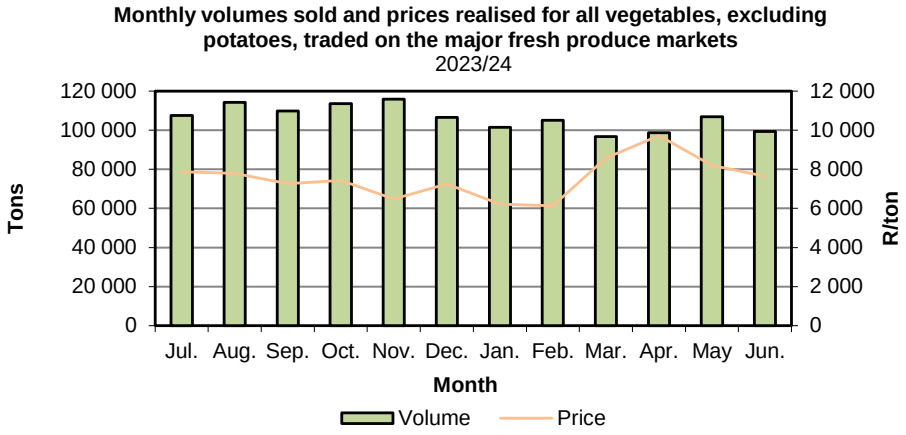
The value of the abovementioned vegetables, except for onions and cabbage, increased during 2023/24 and the highest increase was for pumpkins with 37,4%.

Prices

The average prices of vegetables realised on the fresh produce markets for the period 2019/20 to 2023/24 were as follows:

Year	**2019/20**	**2020/21**	**2021/22**	**2022/23**	**2023/24**
	R/ton				
Tomatoes	6 627,85	8 619,14	8 276,66	9 883,16	10 094,13
Onions	4 415,52	4 082,92	3 951,71	8 878,32	6 552,20
Green mealies and sweet corn	18 663,99	19 062,68	22 380,91	25 655,19	25 468,29
Cabbage	2 695,27	2722,74	2 285,66	3 089,75	2 728,52
Pumpkins	2 332,78	2996,09	3 231,53	2 450,89	4 161,71
Carrots	4 025,06	4 243,73	3 468,65	5 227,43	5 323.79
Other	5 430,94	5 870,34	5 633,60	7 921,76	7 527,41

Of the major vegetable types, the price of onions decreased by 26,2%, while the price of pumpkins increased by 69,8%.



Consumption

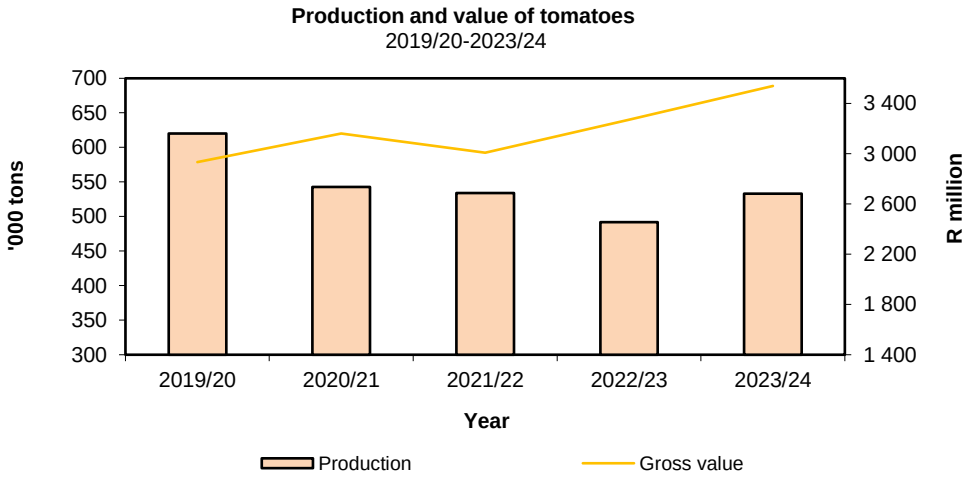
The importance of vegetables in a healthy diet is strongly promoted by all the stakeholders in the fresh produce marketing chain. The per capita consumption of fresh vegetables was 40,22 kg during 2023/24, almost the same than the 41,16 kg of 2022/23.

Tomatoes

Production and value

Production of tomatoes increased by 8,3%, from 492 077 tons in 2022/23 (July to June) to 532 767 tons in 2023/24.

The gross value of production increased by 8,3%, from R3 269 million in 2022/23 to R3 539 million in 2023/24.

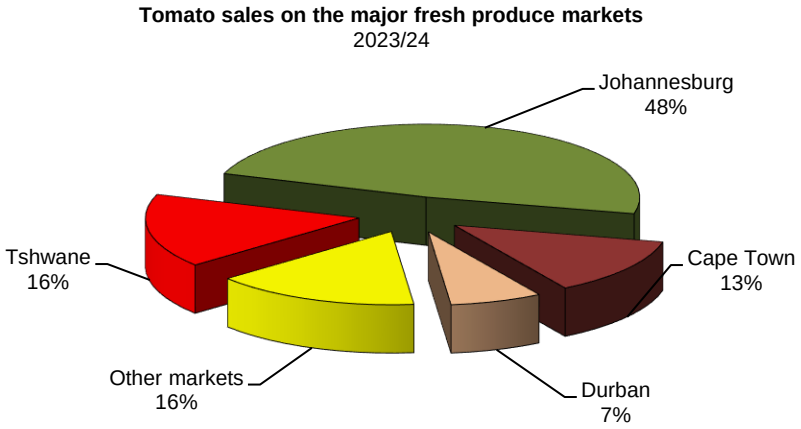


Sales

Sales on fresh produce markets constituted approximately 44,6% and direct sales approximately 24,1% of the total volume of tomato sales.

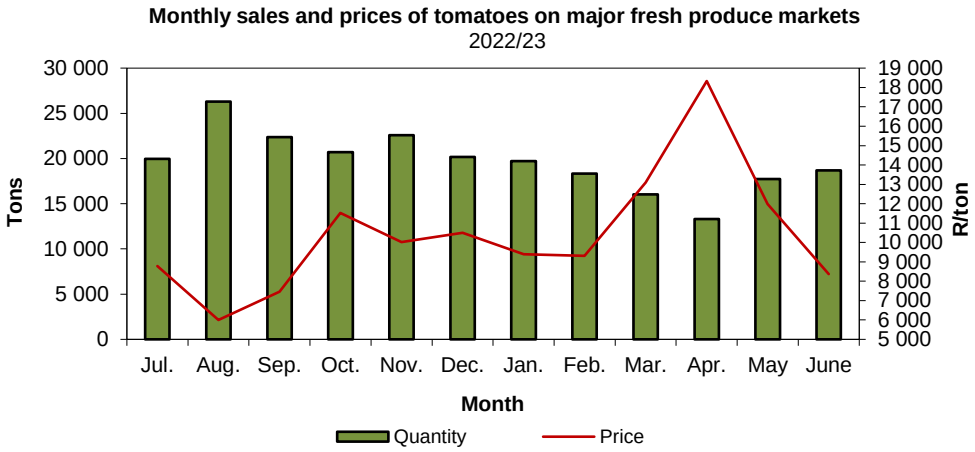
Owing to the geographic distribution and production of tomatoes, a sufficient volume of good quality tomatoes is normally being produced almost throughout the year to meet the daily demand.

The quantity of tomatoes sold on the 17 major fresh produce markets increased by 1,5%, from 233 987 tons in 2022/23 to 237 511 tons in 2023/24.



Prices

The average price of tomatoes sold on the major fresh produce markets increased by 2,1%, from R9 883,16/t during 2022/23 to R10 094,13/t during 2023/24.



*Exports**

The quantity of tomatoes exported increased by 0,4%, from 19 234 tons in 2022/23 to 19 320 tons in 2023/24.

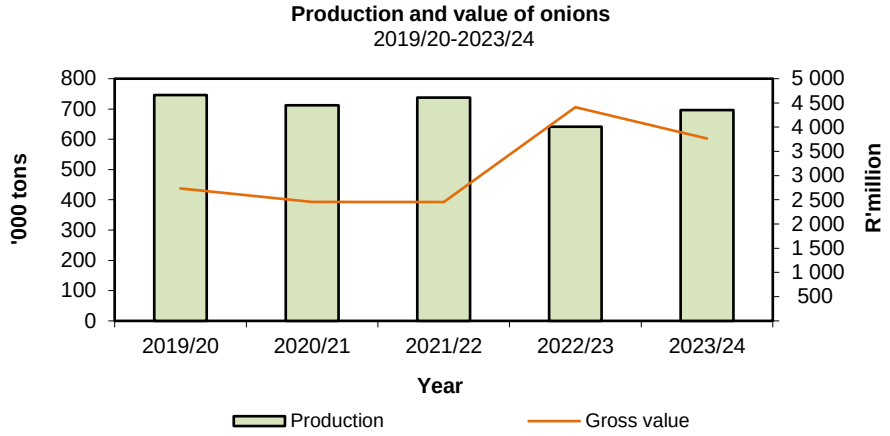
*Source: *Customs and Excise*

Onions

Production

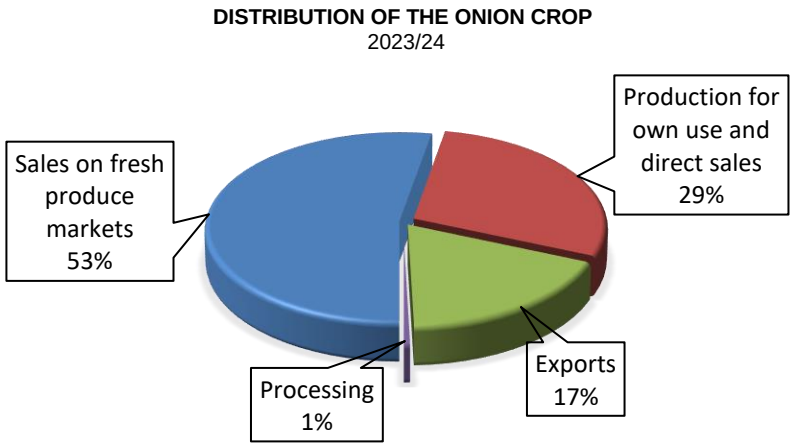
Onions are produced in almost all of South Africa's provinces.

Approximately 696 830 tons of onions were produced during the 2023/24 season (July to June). This is 8,6% more than the 641 596 tons of the previous season. The industry experienced an average annual decrease of 2,1% in production from 2019/2020 to 2023/2024.



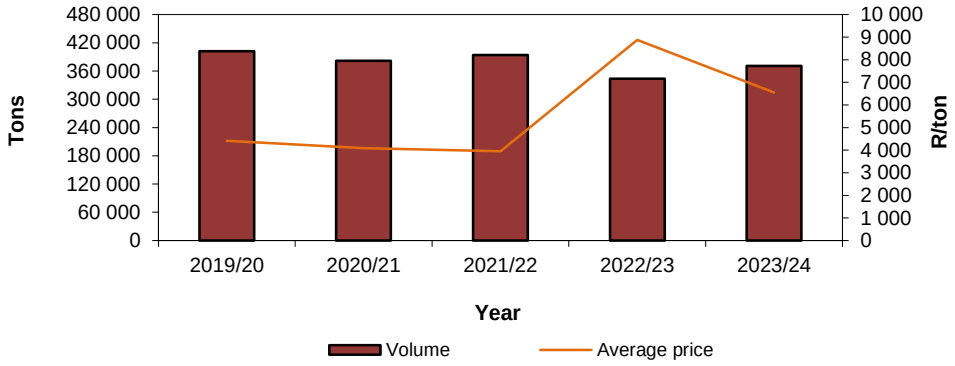
Sales

The fresh produce markets remain an important marketing channel for onions. Approximately 53% of the total production during the 2023/24 season was sold on the major fresh produce markets, while 17% was exported. The remainder comprises of producers' own consumption and direct sales to supermarkets and chain stores (29%) and a small quantity, 1%, was sold to processing factories.



The sales of onions on the fresh produce markets increased by 8,0%, from 343 711 tons in 2022/23 to 371 118 tons in 2022/23.

Sales of onions on the fresh produce markets
2019/20–2023/24



Prices

The average price of onions sold on the fresh produce markets has significantly decreased by 26,2%, from R8 878/t in 2022/23 to R6 552/t in 2023/24.

Processing

Approximately, 1% of the total production of onions was taken in for processing during the 2023/24 season. There has been a decrease of 7,6% in the total processing of onions since the 2019/20 season, when 5 557 tons were taken in for processing compared to 3 427 tons in the 2023/24 season. During 2023/24, about 90,8% was canned and the remaining 9,2% was frozen.

*Exports**

During the 2023/24 season, the volume of onions exported represented approximately 17,0% of the total onion crop. The volume of exports increased by 12,3%, from 108 476 tons in 2022/23 to 121 773 tons during 2023/24.
* Source: *Customs and Excise*

Potatoes

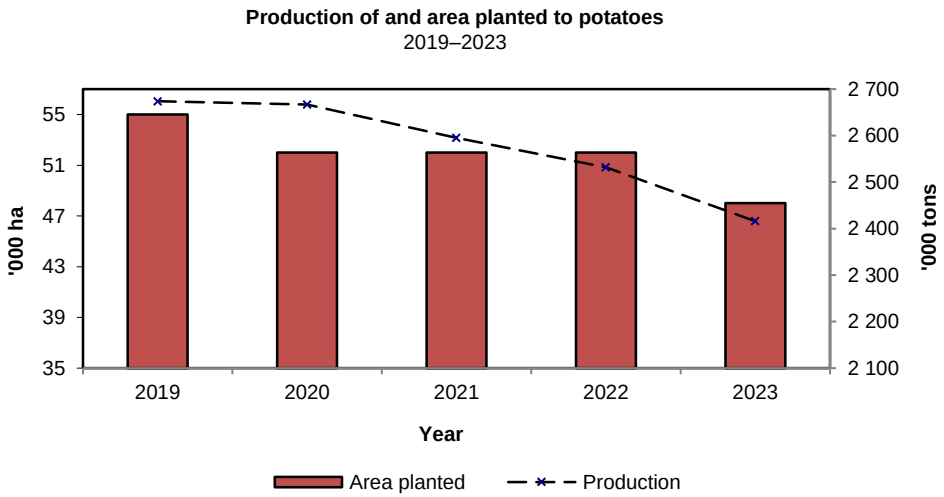
There are 16 distinct potato-production regions in South Africa, which are spread throughout the country. The main regions are situated in Free State, Western Cape, Limpopo and Mpumalanga. Potatoes are planted at different times because of climate differences in the production areas, resulting in fresh potatoes being available throughout the year. In the early 1990s, there was a major shift in production from dryland to irrigation and currently almost 80% of plantings are under irrigation.

Area planted

Plantings for 2023 were 48 399 ha, which was 7,1% less than the 52 095 ha of the previous year.

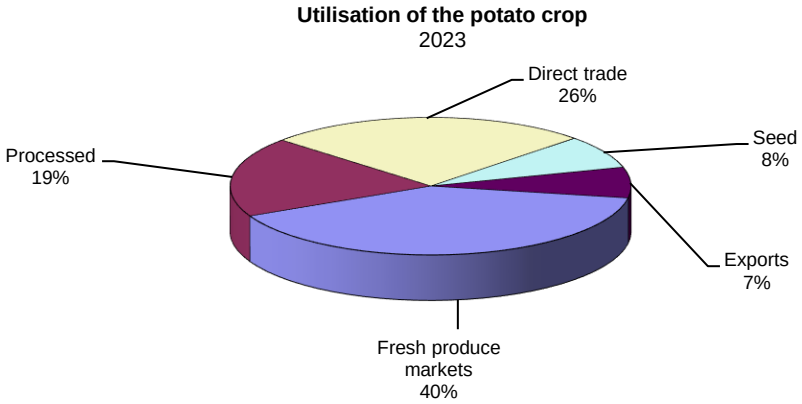
Production

In 2023, the average yield was approximately 4 991 x 10 kg pockets per hectare, compared to 4 861 x 10 kg pockets per hectare in 2022, which is an increase of 2,7%.



Sales

The major fresh produce markets remain an important channel for the sale of potatoes.

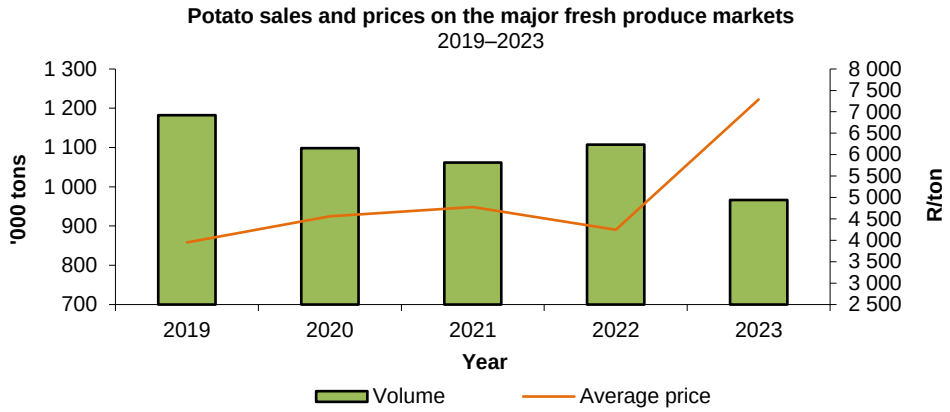


During 2023, approximately 96 million x 10 kg pockets of potatoes were sold on the major fresh produce markets, as against 111 million in 2022—a decrease of 13,5%. The Johannesburg Fresh Produce Market remains the biggest outlet, followed by the Tshwane, Cape Town and Durban markets. During the five years from 2019 to 2023, potato sales on the major fresh produce markets on average showed a decrease of approximately 3,7%.

Prices

Between 2019 and 2023, potato prices realised on the major fresh produce markets increased by an average of 11,0% per annum, from R3 951/t in 2019 to R7 288/t in 2023.

The average price increased by 71,7%, from R4 245/t in 2022 to R7 288/t in 2023.



Processing

During 2023, approximately 18,8% of the total potato production was taken in for processing. About 91,0% of these potatoes were processed into potato chips, both fresh and frozen. The remaining 8,0% and 1,0% was used for freezing and canning, respectively. The processing of potatoes showed a decrease of 4,6%, from 476 362 tons in 2022 to 454 431 tons in 2023.

*Exports**

In 2023, 173 770 tons, approximately 7,2% of total local potato production, was exported. The quantities of potatoes exported decreased from 182 156 tons in 2022. During 2022, 97,0% of total potato exports went to Africa.

*Source: *Customs and Excise*

Consumption

The total gross human consumption of potatoes decreased by 3,5% and the per capita consumption decreased by 1,6 kg to about 35,38 kg.

Year	**2019**	**2020**	**2021**	**2022**	**2023**
Total production (‘000 tons)	2 674	2 669	2 595	2 532	2 416
Gross human consumption (‘000 tons)	2 213	2 205	2 128	2 065	1 981
Per capita consumption (kg p.a.)	37,65	36,98	35,38	33,29	31,62

Prospects

It is expected that there will be a decrease in the production of potatoes in 2024.

ANIMAL PRODUCTION

Livestock numbers

Extensive livestock farming is vast in the country, approximating four-fifths of the agricultural land in South Africa. However, livestock farming is also found were there are mixed farming enterprises.

Below-normal rainfall over the recent years has meant that the area involved in cattle, sheep and goat farming (approximately 590 000 km^2) has been negatively affected, further affecting grazing area which is 53% of all agricultural land in the country. Livestock conditions were reasonable to good in most provinces in recent years. Commercial sheep farms also occur in other areas such as the Kgalagadi, the winter rainfall area and the grasslands of Mpumalanga, as well as the eastern Free State and KwaZulu-Natal, with challenges of wild animals and stock theft threatening the successful farming thereof.

Foot-and-mouth disease is still prevalent in some parts of Limpopo, KwaZulu-Natal, Gauteng, North West and Free State, with movement restrictions in place for identified locations and biosecurity measures encouraged. Other diseases that continue to affect the industry are African Swine Fever, lameness and eye infections.

Cattle

Cattle are found throughout the country, but mainly in Eastern Cape, KwaZulu-Natal, Free State and North-West. Herd sizes vary according to type of cattle, ranging between less than 50 and 300 head of cattle for dairy, while beef cattle herds range from small (less than 20 head of cattle) to large farms and feedlots (more than 4 000 head). Some farms in North West and Gauteng have been found to have some of the largest cattle herds in the country. The production of weaners for the feedlot industry is the main form of cattle farming – feedlots account for approximately 75% of all beef produced in the country. Prices (R/kg) for weaners and live animals are lower for the first half of the year in comparison to 2018 (Source: SA Feedlot Association).

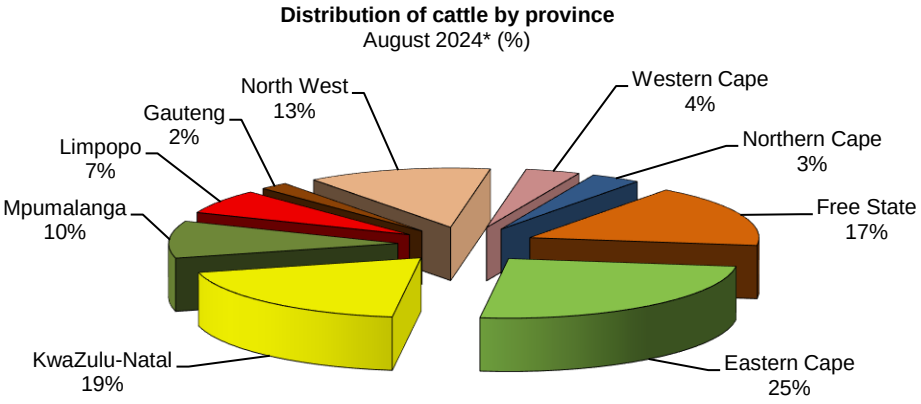
The total number of cattle in South Africa at the end of August 2024 is estimated at 12,149 million, comprising various international dairy and beef cattle breeds in addition to indigenous breeds such as the Afrikaner and the Nguni. The number is approximately 0,40% lower than the estimate of 12,198 million as at the end of August 2023. Beef cattle contribute approximately 80% to the total number of cattle in the country, while dairy cattle make up the remaining 20%. Holstein-Friesian, Jersey, Guernsey and Ayrshire are the four major dairy breeds found in South Africa.

Cattle numbers per province since 2020 are estimated as follows:

Province	**2020**	**2021**	**2022**	**2023**	**2024***
	'000 (August)				
Western Cape	466	467	468	468	466
Northern Cape	419	419	419	418	428
Free State	2 054	2 030	2 062	2 061	2 061

Eastern Cape	3 050	3 068	3 045	3 048	3 024
KwaZulu-Natal	2 380	2 339	2 311	2 315	2 311
Mpumalanga	1 248	1 247	1 230	1 228	1 226
Limpopo	860	841	838	835	811
Gauteng	246	246	245	246	245
North West	1 576	1 576	1 580	1 580	1 577
Total	12 299	12 233	12 197	12 198	12 149

** Preliminary*

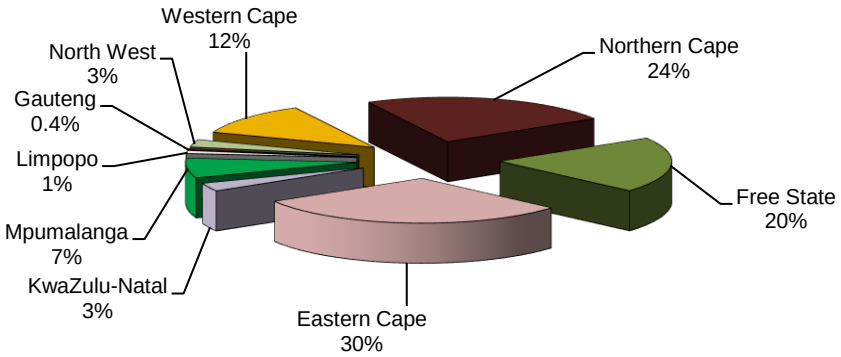


There are various breeders' organisations representing most international and indigenous cattle breeds. Most of the organisations are affiliated with the South African Studbook and Animal Improvement Association. The Milk Producers' Organisation (MPO) is the most prominent producer organisation in the South African dairy sector. The Red Meat Producers' Organisation (RPO) and the National Emergent Red Meat Producers' Organisation (NERPO) represent producers in the commercial and emerging agricultural sectors, respectively.

Sheep

Sheep farming is found in all provinces; but is mostly concentrated in the more arid parts of the country. The total number of sheep in South Africa at the end of August 2024 was estimated at 21,15 million, 1,30% lower than the estimated 21,43 million as at the end of August 2023. For August 2024, the largest number of sheep were estimated to be in Eastern Cape (30%), followed by Northern Cape (24%), Free State (20%) and Western

Distribution of sheep by province
August 2024* (%)



Cape (12%).

Flock sizes vary between less than 50 and 1 800 animals. Sheep flocks in Eastern Cape, Western Cape and Northern Cape tend to be much larger than those in the other provinces, including Free State.

The animals are kept mainly for wool and mutton production and the industry is therefore represented by organisations from the mutton as well as the wool industry. The sheep industry also has various breeders' associations, with the Dorper Sheep Breeders' Society of South Africa and Merino SA being the most prominent. Western Cape, the inland Karoo and Overberg produce wool, mutton, and the pedigree Merino breeding stock.

The number of sheep in the various provinces since 2020 was estimated to be as follows:

Province	**2020**	**2021**	**2022**	**2023**	**2024***
	'000 (August)				
Western Cape	2 545	2 540	2 538	2 527	2 502
Northern Cape	5 182	5 172	5 149	5 147	5 051
Free State	4 330	4 309	4 314	4 310	4 272
Eastern Cape	6 513	6 442	6 434	6 414	6 333

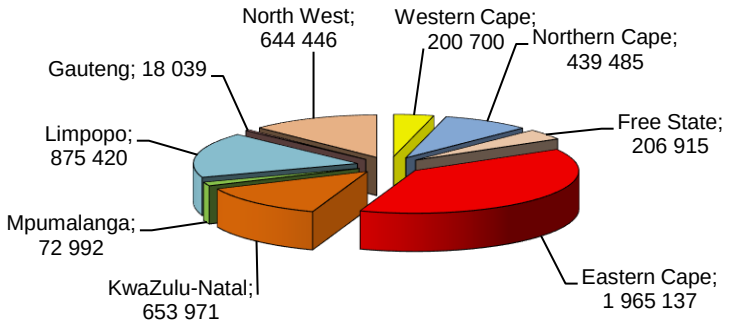
KwaZulu-Natal	628	617	615	619	618
Mpumalanga	1 527	1 512	1 513	1 520	1 506
Limpopo	199	192	192	215	215
Gauteng	84	84	84	84	83
North West	596	596	593	589	574
Total	21 604	21 464	21 432	21 426	21 154

** Preliminary*

Goats

Goats are found mainly in Eastern Cape, Limpopo, KwaZulu-Natal and North West. Estimates indicate that there was a decrease of 0,35% in the number of goats, from 5,125 million in August 2023 to 5,027 million in August 2024.

Distribution of goats by province
August 2024*



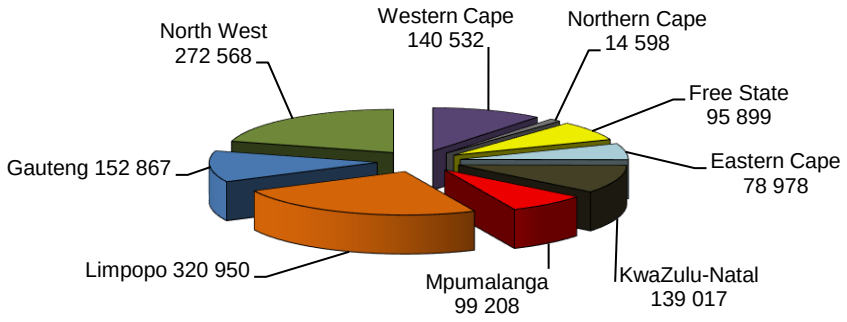
**Preliminary*

Flocks of goats intended for meat production are usually smaller than sheep flocks, averaging approximately 300 goats per farm. Angora goats are kept primarily for mohair production, while Boer goats are mainly for meat production. According to the SA Milch Goat Breeders' Society, there are also farmers who have adopted a market differentiating strategy by producing goat's milk and these are increasing in numbers.

Pigs

Pigs are found in high numbers in Limpopo, North West, Gauteng and Western Cape. There are approximately 400 commercial pork producers and 19 stud breeders in South Africa. It is estimated that pig numbers declined by 0,45%, from 1,321 million to 1,315 million between August 2023 and August 2024.

Distribution of pigs by province
August 2024*



**Preliminary*

The South African Pork Producers' Organisation (SAPPO) is the official mouthpiece for pork producers in South Africa. This organisation is primarily concerned with administration, liaison with Government, the promotion of pork and pork products and matters of national interest such as health and research. The organisation is also concerned with consumer education, as well as business development for sustainable, economic viability and profit maximisation of producers.

According to SAPPO, most pork meat imports originate from Europe and Brazil, while a few SA neighbouring countries are export destinations. The total number of employees in the formal pork production industry in South Africa is estimated to be approximately 10 000, comprising about 4 000 farm workers and 6 000 workers in the processing and abattoir sectors.

Red meat

The red meat industry is one of the most important growing industries in the South African agricultural sector. It contributed approximately 15,1% to the gross value of agricultural production in the RSA during 2023/24. While sheep farming is mainly extensive, a large percentage of beef animals are supplied by feedlots.

Livestock slaughtering

It is estimated that the total number of cattle slaughtered increased by 27,7%, sheep (including lambs) slaughtered increased by 1,5% and pigs slaughtered decreased by 0,5% from 2022/23 to 2023/24.

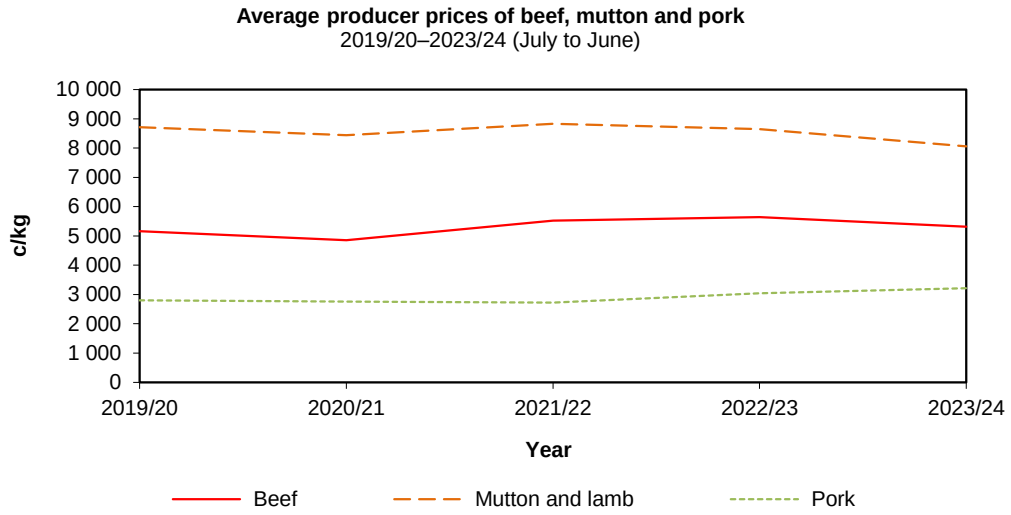
Commercial slaughtering of red meat producing livestock categories over the past five years were as follows:

Year	**2019/20**	**2020/21**	**2021/22**	**2022/23**	**2023/24**
Cattle	2 592 605	2 629 884	2 579 000	2 059 029	2 628 440

Sheep and lambs	4 464 404	3 920 889	3 840 496	3 792 140	3 850 410
Pigs	3 281 635	3 396 979	3 728 838	3 813 593	3 795 290

Auction prices

The prices for red meat are mainly determined by the interaction between demand and supply (the latter two are affected by the level of the consumers' disposable income, the prices of substitute products and import parity prices, etc.). In the case of mutton, for example, the level of wool prices also influences the domestic supply of mutton.



In view of the ever-strong influence of international trade on the local mutton industry, both the cyclical and seasonal price patterns for mutton were influenced by imports. The average producer price for pork increased by 5,6%, from R30,48/kg in 2022/23 to R32,17/kg in 2023/24.

The average producer price for beef decreased by 5,7%, from R56,44/kg to R53,21/kg in 2023/24. The average producer price for mutton and lamb decreased by 6,8%, from R86,45/kg in 2022/23 to R80,60/kg in 2023/24.

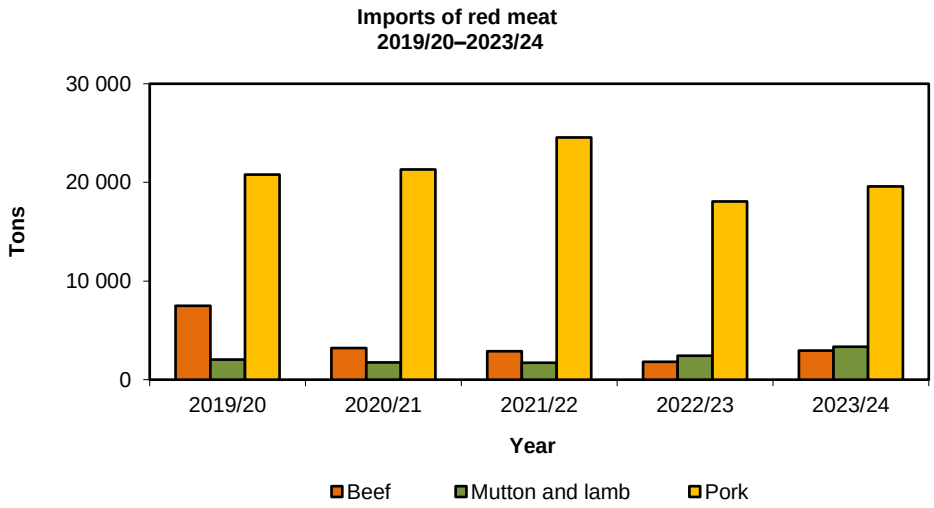
Imports

Imports of red meat increased by 16,1%, from 22 326 tons in 2022/23 to 25 922 tons in 2023/24 (3,3% lower than the average of approximately 26 807 tons for the five years up to 2023/24).

Beef imports amounted to 2 961 tons in 2023/24, which is an increase of 63,9% from the 1 807 tons imported during 2022/23 and 19,4% lower than the five-year average of 3 676 tons up to 2023/24.

Imports of pork amounted to 19 608 tons, an increase of 8,4% from the 18 081 tons imported during 2023/24 and 6,0% lower than the five-year average of 20 869 tons up to 2023/24.

Imports of mutton during 2023/24 amounted to 3 353 tons, an increase of 37,5% from the 2 439 tons imported the previous year and 48,2% higher than the average of 2 263 tons for the five years up to 2023/24.



Poultry

The poultry industry consists of the day-old chick, the broiler and the egg supply. The South African Poultry Association (SAPA) represents both commercial and non-commercial poultry farmers within these three subsectors.

This article focuses on the broiler and the egg industry, as the chick supply is an input into both.

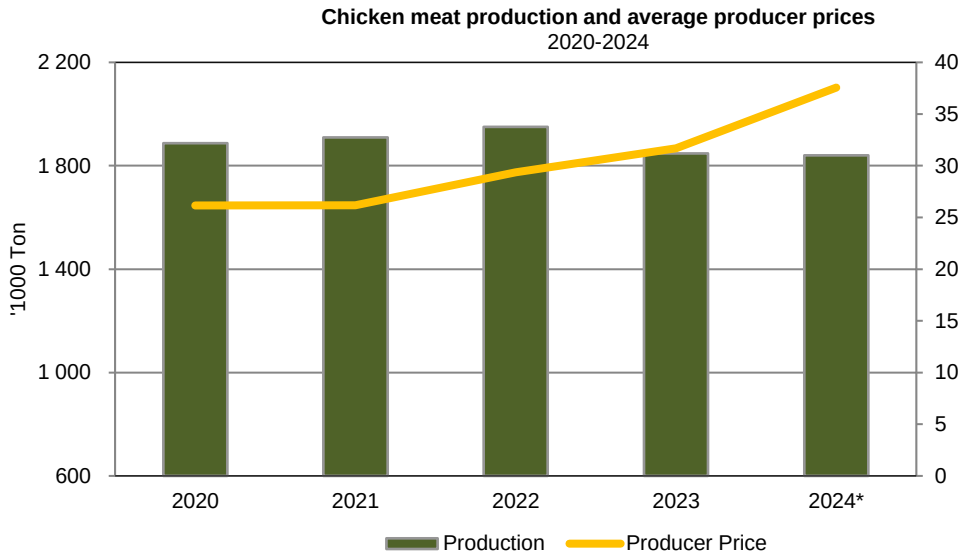
Broiler industry

The broiler industry continues to dominate the agricultural sector in South Africa as the main supplier of animal protein.

Production

The distribution of broiler birds (including broiler breeders) per province is as follows: North West (24,3%), Mpumalanga (19,8%), Western Cape (16,8%), Gauteng (11,4%), Free State (10,1%), KwaZulu-Natal (7,8%), Eastern Cape (6,2%), Limpopo (3,4%) and Northern Cape (0,2%).

In 2023, a total of 1 113 million day-old chicks were hatched, a decrease of 5,4% compared to the previous year. The average number of broilers slaughtered for commercial markets during 2023 was estimated at 1 063,4 million. This is 4,4% less than the 1 112,7 million slaughtered during 2022. Annual production of chicken meat totalled 1,840 million tons in 2023. This includes broilers for commercial markets, production by subsistence farming and meat from the sale of spent broiler breeder hens and cocks and spent hens from the egg industry.



* Expected production for 2024 and average producer price for the first nine months of 2024

Prices received by producers

The average weighted basic gross price (before rebates, advertising and distribution costs are deducted) received by producers of broilers increased by 18,5%, from R31,70/kg in 2023 to R37,56/kg in 2024.

Average weighted producer prices of broilers from 2020 to 2024 are as follows:

Year	**2020**	**2021**	**2022**	**2023**	**2024***
	R/kg				
Price of broilers	26,16	26,18	29,36	31,70	37,56

** Preliminary: January to September 2024*

Consumption

Consumption of poultry meat accounted for 62,6% of the total meat consumed (beef, mutton, goat, pork and poultry) in 2023 compared to 62,0% of the previous year. The per capita consumption of poultry meat decreased slightly by 2,7%, from 36,5 kg in 2022 to 35,4 kg in 2023.

Per capita consumption of commercially produced poultry meat from 2019 to 2023 is as follows:

Year	**2019**	**2020**	**2021**	**2022**	**2023**
	kg/year				
Per capita consumption	39,0	38,7	38,0	36,5	35,4

Imports

In 2023, poultry imports totalled 414 975 tons, a year-on-year increase of 41 926 tons, or 11,2%. The value of imports amounted to R4,8 billion.

Brazil was the main country of origin of imports in 2023, accounting for 82,4%, or 342 095 tons of total poultry imports into South Africa. The USA was the second-largest importer with 9,4%, followed by Argentina with 4,2%. The EU contributed 2,3% to total poultry imports.

Prospects

The forecasting model used to predict broiler breeder bird numbers and number of broilers slaughtered was updated in 2022. The hatcheries projected 21,34 million chicks per week, which is a decreased by 5,4% as compared to the 22,57 million during 2022. Based on the number of day-old parent pulled placed, the size of the breeder laying flock is expected to increase by 19,6% or 7,15 million during the first four months of 2024.

Egg industry

Based on information provided by SAPA, the distribution of layers per province is as follows: Gauteng (24,8%), Western Cape (16,9%), Free State (14,6%), KwaZulu-Natal (12,4%), North West (11,9%), Limpopo (8,0%), Mpumalanga (8,0%) Eastern Cape (3,1%) and Northern Cape (0,3%).

The number of layers decreased by 11,1%, from 27,40 million in 2022 to 21,31 million in 2023. An average flock of 23,28 million layers is projected for the first four months of 2024, this will be a decrease of 15,0% compared to the same period in 2023.

The average price received by egg producers during 2024 was 15,3% less than the average price received during the same period of 2023.

The average weighted producer prices of eggs from 2020 to 2024 are as follows:

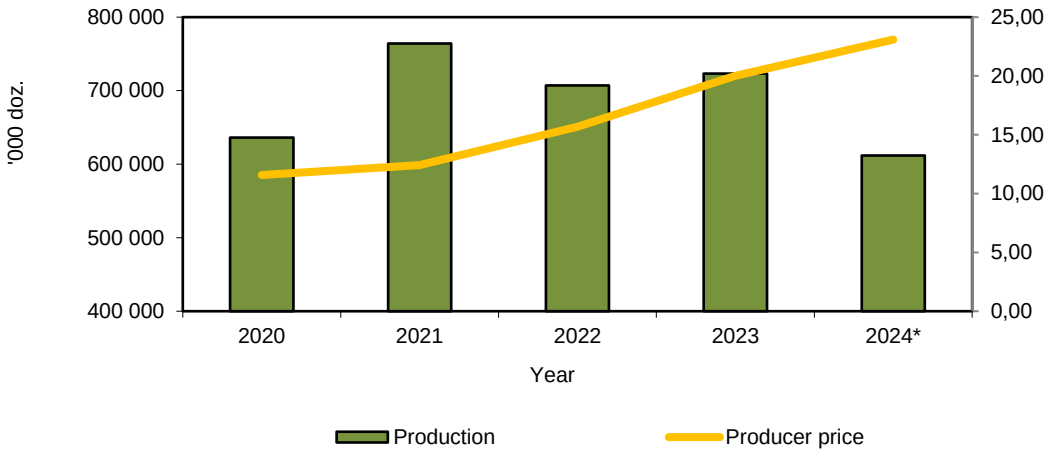
Year	**2020**	**2021**	**2022**	**2023**	**2024***
	R/dozen				
Price of eggs	11,58	12,41	15,69	20,02	23,02

** Preliminary: January to September 2024*

Production

Egg production showed a year-on-year decrease of 15,3% in 2023. The average number of cases produced per week was 391 400 compared to 462 200 cases per week in 2022. The total production of eggs for human consumption in 2023 was 612 million dozen, a decrease of 15,4% as compared to 723 million dozen of the previous year.

Production of eggs and prices received by producers
2020–2024



** Preliminary: January to September 2024*

Consumption

The per capita consumption in 2023 was 148,2 eggs or 9,06 kg compared to 123,0 eggs or 7,52 kg in 2022. During 2023, the annual turnover was R14,03 million, an increase of 9,4% as compared to R12,82 million in 2022. Eggs are still an affordable animal protein source compared to meat.

Prospects

New breed standards have been applied to the model and the laying cycle has been extended by up to 78 weeks. These changes resulted in an increase in the estimated size of the national laying flock in terms of the number of egg cases produced and the mean egg weight. Hen numbers decreased from 27,40 million at the end of December 2022 by 15,0%, or 23,28 million, during the same period of 2023. Consequently, egg production is expected to decrease by 21,0%, or 348 500 cases per week, during the first four months of 2024.

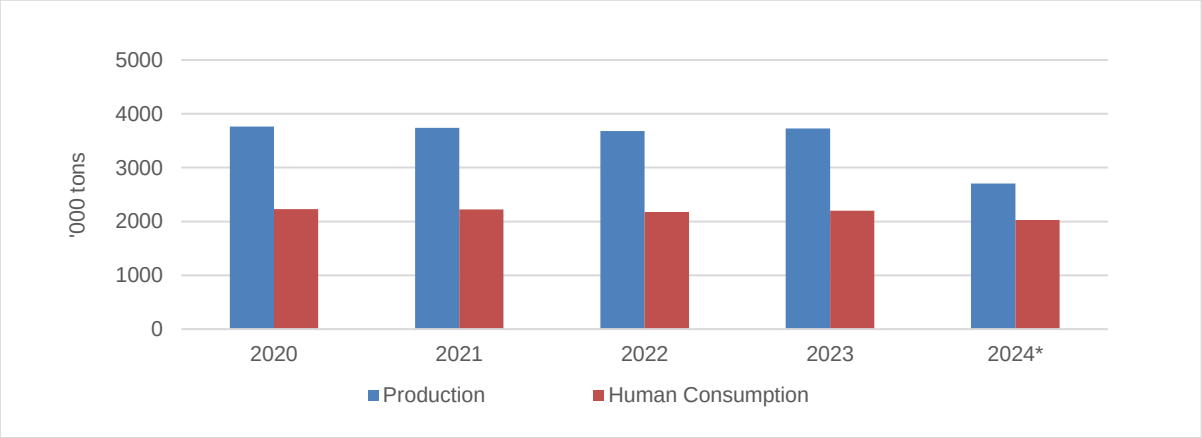
Milk

Milk production in South Africa is concentrated largely in the coastal regions because of their mild temperatures and good rainfall conditions, which assures good quality, natural and artificial pastures. According to milk South Africa, in 2023, the Eastern Cape was the largest milk producer in South Africa with the share of 29,5%, followed by the Western Cape and KwaZulu-Natal by 28,3% each, Mpumalanga by 4,5%, Gauteng by 4,4%, Free State by 3,2%, North West by 1,4% and Limpopo by 0,4%. The number of milk producers in the country decreased by 483 or 35,4% and was estimated at 882 producers in January 2023, from 1 365 in January of 2018. This resulted in an average decrease of 0,3% per year in milk production since 2018.

South Africa's milk industry is the smallest globally and contributes only 0,4% to the world milk production. However, in terms of the value of agricultural production, the milk industry is the seventh largest agricultural industry in South Africa. The gross value of milk produced in 2023, including milk for the producer's own consumption and on-farm usage, increased by 16,1% and was estimated at R27 639 million, when compared to R23 797 million in 2022. This was largely driven by the better price which was received by farmers for milk production.

Milk shortages are rarely reported in South Africa as the supply is always sufficient to meet the local demand. Production of total milk (*which includes production from commercial, informal and subsistence farms)* increased by 1,2% to 3 727 million litres in 2023, from 3 682 million litres in 2022.

The graph below depicts total milk production and human consumption of milk from 2020 to 2024.



Source: Milk SA and DALRRD

**January-September*

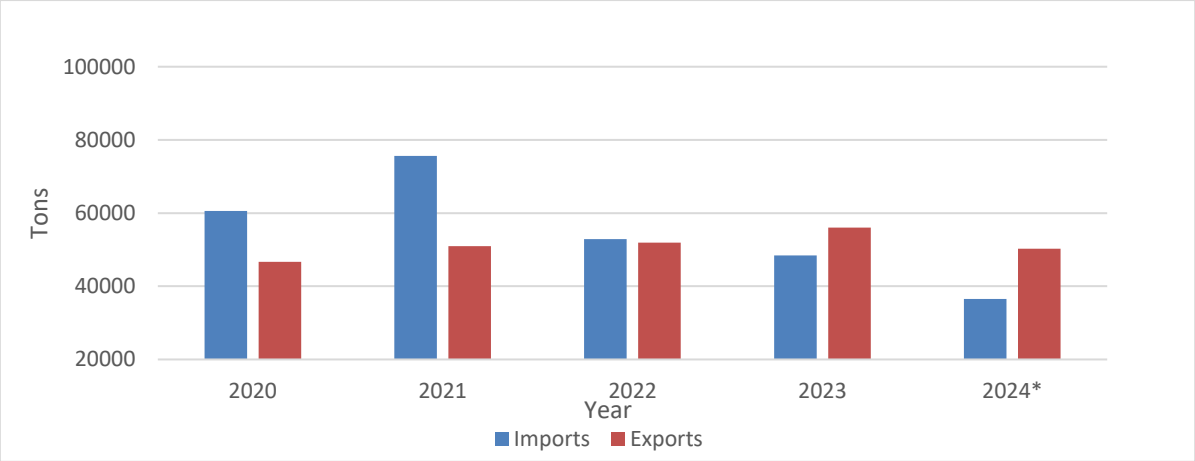
Prices

The average producer of milk for the period January to September 2024 is R7,58 per litre, compared to R7,42 per litre during the corresponding period in 2023, which is an increase of 4,8%.

Production season	2020	2021	2022	2023	2024*
	c/ℓ				
Average producer price	501	566	646	742	758

** Preliminary: January to September*

Imports and exports of milk and milk products



Source: SAMPRO

**Estimates*

South Africa remained the net exporter of milk and milk products. In 2023, the exported milk and milk products increased by 4 130 tons (8,0%) and amounted to 56 075 tons, as compared to 51 945 tons in 2022. In contrast, the imported milk and milk products decreased by 8,4% to 48 469 tons, from 52 918 tons in 2022.

Wool

Areas of production

Wool is produced throughout South Africa; however, the main production areas are in the drier regions of the country. Based on annual sales of producer lots, Eastern Cape was the largest wool-producing province during 2023/24 with 15,8 million kg, followed by Western Cape with 8,2 million kg, Free State with 7,9 million kg, Northern Cape with 5,2 million kg and Mpumalanga with 1,8 million kg, while 1,5 million kg were produced in the remaining four provinces.

Production

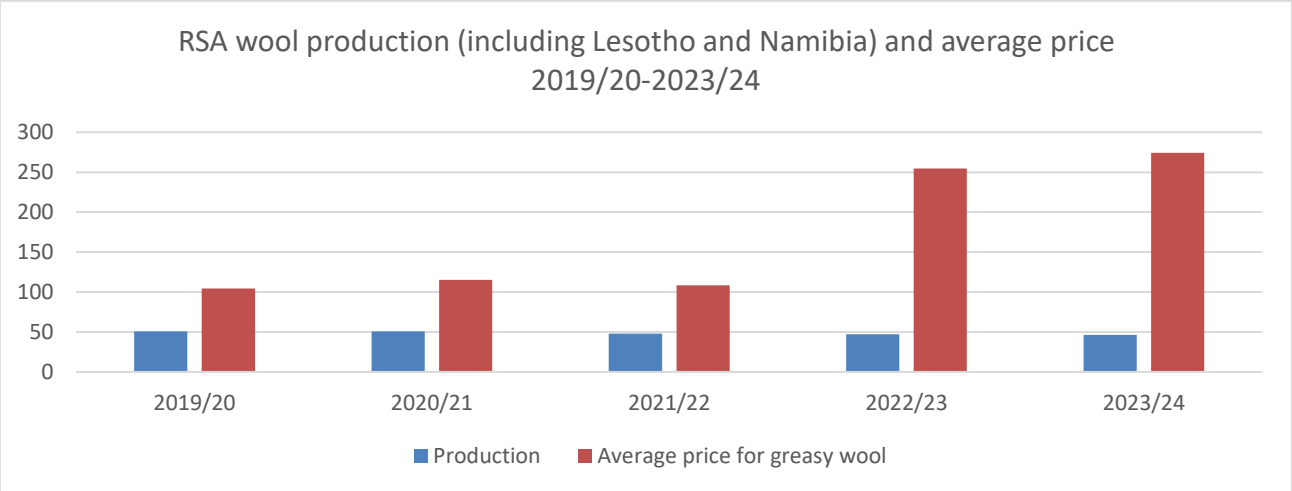
South Africa, like Australia, produces mainly apparel wool, while the bulk of the wool of the other major producers, such as New Zealand, China, Uruguay and Argentina, is the coarse type used in the manufacturing of carpets and interior textiles. The main fibres competing with wool are cotton and man-made fibres such as polyester, nylon and acrylic.

Total receipts for 2023/24 decreased to 46,4 million kg, a decrease of 1,8% from 2022/23, even though Lesotho producer's volumes have increased by 0,9%

Marketing

An excess of 90% of all greasy wool sold in South Africa is traded by means of weekly auctions taking place from August to June. Normally, there is considerable volatility in prices during and between auctions. The price of wool is determined by a complex set of variables, including the level of the market in Australia on a specific day, exchange rate fluctuations, quantities offered for sale at auctions, the specific demand for different wool types at various times, the extent and timing of contract commitments by local buyers for delivery to clients and the prevailing economic conditions in wool-consuming countries.

South Africa produces mainly a Merino clip, which comprises more than 80% of all lots offered for sale. Mean fibre diameter is the major price determinant for Merino wool, with finer micron categories normally commanding a premium over medium and strong wool.



Marketing arrangements

Wool marketing in South Africa is free from statutory intervention. Wool is traded primarily via the open-cry auction system. Wool auctions are centralised in Port Elizabeth and runs from August of one year to June the next year. Alternative selling mechanisms, such as contract growing, forward deliveries and futures, have not been established in the South African wool industry.

The global price for apparel wool is determined in Australia, where the largest volumes of wool are traded. South Africa, with its small clip, is therefore a market follower or price-taker.

Numerous sellers and few buyers are typical of wool auctions. Buyers normally have to compete for wool over a number of auctions to make up processing batches to meet their clients' contract specifications in terms of price, quantity and delivery date. Contracts in foreign currencies, such as the euro or the US dollar, have to be converted into buying limits in Rand and the buyer carries the risk.

Cape Wools of South Africa promotes the interests of the South African wool industry. It is a non-profit company established and owned by farmers and other directly-affected industry groups registered with the Wool Forum, which represents all role players in the industry. The board of directors proportionately represents these groups. Cape Wools started operating on 1 September 1997.

Cape Wools' service portfolio comprises market information and statistics; research and development; transfer of wool production and promotion of wool. The Wool Trust, comprised of funds transferred from the former Wool Board, funds Cape Wools.

Exports

Wool is an export product with approximately 94% of total production being shipped overseas, in either greasy or semi-processed form (scoured and wool top). Main export destinations for the year under review were China, the Czech Republic and Italy.

During 2023/24, the major export destinations for South African wool were as follows:

Wool shipments to the five top export destinations – July 2023 to June 2024								
Country	Greasy		Scoured		Top and noils		Total	% of total FOB value
	Value R1 000	Volume Kg	Value R1 000	Volume Kg	Value R1 000	Volume Kg	Value R1 000	
China/Macau/ Hong Kong	3 464 526	38 617	0	0	0	0	3 464 526	80,1
Czech Republic	494 037	4 720	0	0	0	0	494 037	11,4
Italy	135 789	895	0	0	0	0	135 789	3,1
Bulgaria	117 063	699	0	0	0	0	117 063	2,7
India	75 103	822	0	0	0	0	75 103	1,7

Outlook

The outlook for wool in 2024 is mixed, with growth in the market size expected, but concerns regarding sustainability.

Mohair

Production

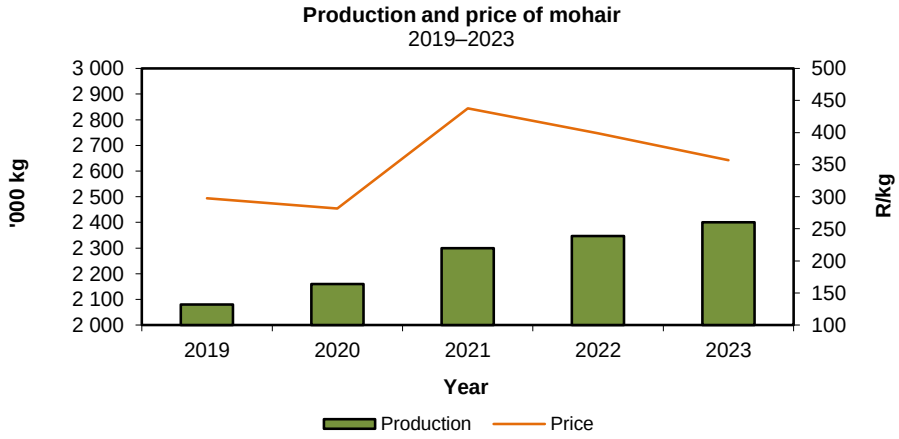
Mohair production in South Africa mainly occurs in Eastern Cape and the adjacent part of Western Cape. South Africa produces approximately 53% of the world mohair clip. In realising the responsibility involved in being the most reliable source of mohair, Mohair South Africa was established to perform functions aimed at the advancement of the entire mohair industry. Through selective breeding and farming techniques, the Angora goat farmer plays a crucial role in promoting the constant availability of quality natural fibres.

South Africa's mohair production was stable at 2,4 million kg in 2023 compared to 2,34 million kg in 2022. The trend continues to surge slightly upward in comparison to the two seasons.

Production of mohair by South Africa during the period 2019 to 2023 is as follows:

Year	2019	2020	2021	2022	2023
	Million kg				
Production	2,1	2,2	2,3	2,34	2,4

Prices



During the last half of 2022, the mohair price started to decline. As more than 90% of South African mohair is exported to countries like Italy, China and the UK, the mohair price is also linked to international economies. The war between Ukraine and Russia had a direct economic impact on the countries purchasing South African mohair, which affected the mohair price towards the end of 2023.

The average auction price of mohair decreased by 10,5%, from R398,89/kg in 2022 to R356,94/kg in 2023. Although the kid sector experienced some downward pressure, the rest of the clip had good demand.

Average auction prices of mohair for the period 2019 to 2023 are as follows:

Year	2019	2020	2021	2022	2023
	R/kg				
Price	297,48	281,62	437,75	398,89	356,94

Imports and exports

Most of the world mohair production is imported to South Africa for further processing, after which it is exported together with locally-produced mohair. This includes mohair produced in Lesotho. Italy became the leader in

mohair imports from South Africa in 2020/2021, followed by China and UK. Mohair exports decreased by 5,4% from 2022 to 2023. The imports remained almost the same between 2022 and 2023.

Year	**2019**	**2020**	**2021**	**2022**	**2023**
	Million kg				
Imports	1,3	1,3	1,3	1,3	1.3
Exports	3,3	3,0	3,2	2,7	2.6

Prospects

Mohair South Africa launched an internationally recognised standard in March 2020, called the Responsible Mohair Standard (RMS). This standard ensures that South Africa offers an ethically and sustainably certified product. The beginning of 2021 saw the first RMS-certified mohair being offered to buyers, which increased the demand for South African mohair. 80% of the South African mohair clip now complies with the internationally recognised Responsible Mohair Standard, which will become the minimum standard if a farmer wants to sell his mohair at competitive prices. The industry is also working on a life-cycle assessment, which will measure the impact we have on the environment. With the world focusing on counteracting the effects of climate change, it is important for us to know our impact and then plan how we can improve.

Mohair production in South Africa is on the rise, with most of the mohair production areas in South Africa receiving good rains after a six to seven-year drought. Rain means natural feed for the Angora goats, which makes it more profitable to farm with these goats. Mohair price per kilogram remains lucrative and Angora goat farming has become an attractive farming commodity. By mid-year 2024, production is up by more than 10% compared to the previous year at the same time.