

## Production conditions in South Africa's agriculture in 2025 and the outlook for 2026

- As we approach the end of 2025, it is fair to characterise the year as one of mixed fortunes for South Africa's agriculture. On the upside, we have the robust field crops, horticulture, and wine. On the downside, it has been a more challenging time for the livestock industry, mainly cattle farming, due to foot-and-mouth disease.
- Among the year's positives, early concerns that late rains would disrupt plantings of summer grains and oilseeds disappeared relatively quickly. We received excellent showers lasting much longer than usual through to the end of April 2025. This led to further concerns about grain quality due to excessive moisture. Indeed, we struggled with the quality of maize, particularly white maize. However, this was not severely damaging.
- We ended the 2024-25 summer grains and oilseeds production season with a harvest of 20.2 million tonnes, up 30% from the previous season. This figure comprises maize, soybean, sunflower seed, groundnuts, sorghum, and dry beans. There was an annual uptick across all crops. In fact, the soybean harvest reached a record 2.771 million tonnes. Moreover, the 2024-5 maize crop was the second largest on record at 16.44 million tonnes.
- The gains of the favourable La Niña rains did not end in grains and oilseeds. We saw ample harvests in sugar, as well as various fruits, vegetables and wine. For example, South African sugar production for the 2024-25 production season is forecast at 2.09 million tonnes, up by 7% year-on-year. We also received encouraging production data from SA Wine and Vinpro, forecasting South Africa's wine grape harvest at 1.244 million tonnes, an 11% recovery from the poor harvest of 2024.
- Moreover, the South African Table Grape Industry has also posted some upbeat production figures, indicating that the 2024-25 total harvest inspected is 78.9 million cartons, 4% higher year-on-year. Citrus production was also robust, and boosted exports. In the 2025 export season, Southern African citrus growers packed 203.4 million 15kg cartons for delivery to global markets, up 22% from 2024. Driving the growth are favourable weather conditions in the growing regions and the many young trees that came into fruit this season. We also see encouraging production data from various fruits and vegetables.
- In poultry production, the ample maize and soybean harvest led to lower prices, benefiting the industry. Maize and soybean typically account for around 60-70% of poultry production costs. Therefore, a decline in prices greatly improves operating conditions.

- These ample harvests boosted overall agricultural exports this year. The cumulative value of South Africa's agricultural exports for the first three quarters of 2025 is US\$11.7 billion, representing a 10% increase from the corresponding period in 2024. This is an encouraging development showing that South Africa's agricultural exports have remained strong since the start of the year despite significant trade policy shifts and uncertainty. The improvements in port logistics, which contributed to better export performance alongside better harvests, were another positive this year.
- On the downside, the cattle industry has been under pressure throughout 2025 due to the spread of foot-and-mouth disease, which led to temporary closures of some export markets. This also created financial pressure on the farmers. Therefore, while much of the sector seems to have had a positive year, the cattle industry struggled. Fortunately, as the year draws to a close, the country has taken a significant step toward vaccinating the roughly 12 million national herd of cattle, with 7.2 million in commercial production. The logistics of successfully carrying out this process will become clearer in 2026 as the vaccination process gains momentum. Another important realization of the year was that South Africa needed to revive its vaccination program and possibly involve the private sector.
- Fortunately, this year, the foot-and-mouth disease challenge in the cattle industry did not spill over into the wool industry. In 2022-23 outbreaks, we saw China block South Africa's wool imports due to foot-and-mouth disease, which affected cattle, not sheep. This time around, we did not face such a risk, and wool exports continued smoothly.
- Overall, we are ending this year with renewed optimism in the sector, as La Niña rains are expected to continue, and vaccination will help address the foot-and-mouth disease challenge. The Agbiz/IDC Agribusiness confidence index is up, having increased by 5 points to 67 points in the last quarter of 2025. This shows the improvement in sentiment as the Index is well above its 50-neutral mark, which separates optimism and pessimism (when below 50). Therefore, 2026 may be a broad growth year, an improvement on the mixed recovery of 2025.