

South Africa's 2025-26 winter crop harvest estimate is mildly down from last month, but still at decent levels

- **We feel at ease that South Africa's 2025-26 winter crop harvest will remain at decent levels. The data released this afternoon by South Africa's Crop Estimates Committee shows that the 2025-26 winter crop harvest is at 2.76 million tonnes, down mildly by 0.5% from the previous month. This estimate comprises wheat, barley, canola, oats and sweet lupines. The mild downward revisions are mainly on wheat (0.3%), barley (1%), and oats (6%). Still, the current overall winter crop production estimate is up 4% from the 2024-25 production season. We are now on the fourth production estimate with six more to follow. However, at this stage, the figures are more realistic and unlikely to change significantly as the harvest progresses.**
- For the major winter crop, wheat, farmers have delivered about 960,378 tonnes to commercial silos since the start of October 2025. This volume equals 47% of South Africa's expected 2025-26 wheat harvest of 2.03 million tonnes. In the expected overall 2.76 million tonnes of South Africa's 2025-26 winter crop harvest, approximately 2.03 million tonnes are wheat. The harvest is up 5% from the 2024-25 season. The annual improvement is boosted by the expected better harvest in the Northern Cape, Free State, Eastern Cape, and Limpopo. The Western Cape, which accounts for over half of South Africa's winter wheat production, is expected to experience a mild decline in the harvest this year compared to the 2024-25 season due to unfavourable weather conditions in some parts of the province.
- A potential wheat harvest of 2.03 million tonnes implies that South Africa may need to import approximately 1.74 million tonnes in the 2025-26 season to meet our annual needs. These imports are expected to be down 5% from the 2024-25 season. The import activity is not expected to be a significant challenge, given ample global wheat supplies. The International Grains Council forecasts a record 2025-26 global wheat harvest of 827 million tonnes, up 3% from the previous season.
- The 2025-26 barley harvest is forecast at 341,770 tonnes, down 1% from last month, and 8% lower than the previous season. This is due to both the decline in area plantings and expected poor yields in some regions. Regarding canola, the 2025-26 production is forecast at 311,890 tonnes, unchanged from last month and 7% up from the previous season. The annual gains are primarily due to increased area plantings.
- South Africa's 2025-26 oats production is forecast at 53,813 tonnes, down 6% from last month. Still, this is up 24% from the previous year, due to increased area plantings. Also worth highlighting is that

South Africa's 2025-26 sweet lupine harvest is forecast at 21,000 tonnes, unchanged from last month and 9.3% higher than the previous year, and also supported by the expansion in area plantings.

- Overall, South Africa's 2025-26 winter crop harvest is underway, and yields look decent across the various regions. With the production figures we have at hand, combined with global wheat supplies, we view the situation as boding well for a moderating path of food price inflation.